AmeriCorps Program

Director Manual

A Resource for State Program Directors
Updated January 2014

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Introduction

1. Purpose of This Manual

The Idaho AmeriCorps Program Director Policy and Procedure Manual has been specifically designed as a guide for those who administer Idaho AmeriCorps programs. This manual will assist in detailing the process for monitoring, supporting, and evaluating programs and, above all, for working collaboratively to make the AmeriCorps programs in Idaho successful.

Please note that the information contained in this manual does not include all the legal requirements of an AmeriCorps grant. Program directors or individuals with particular questions should consult the National and Community Service Act of 1990 (42 U.S.C. 12501 et seq.), the regulations issued under the Act (45 CFR Sections 2520 – 2550), the AmeriCorps Grant Provisions and Grants Policy guidance, and relevant state law and regulations. If there is a conflict between the content of this handbook and the AmeriCorps provisions, the provisions are the controlling authority.

The Idaho AmeriCorps Program Director Policy and Procedure Manual:
* Provides a roadmap for AmeriCorps grantee/site management
* Lays out a typical administrator's general work load
* Illustrates legal requirements
* Shows where there is both control and flexibility to shape each AmeriCorps program

It is important that sub-grantees become familiar with all the information contained in this manual. **The Idaho AmeriCorps Program Director Policy and Procedure Manual** will be revised as needed. Revisions will be sent to each Idaho AmeriCorps Program Director.

2. Laws, Regulations and Provisions

Laws
National and Community Service Act of 1990, as amended
* (42 U.S.C. 12501, et seq.) – Chapter 129 (approx. 95 pages)

National and Community Service Trust Act of 1993
Serve America Act of 2009
http://www.nationalservice.gov/help/serve_america_act/Serve_America_Act.htm

Please visit http://www.americorps.gov/for_organizations/manage/index.asp for more information.

Regulations
* 45 CFR Parts 2500 – 2504   **Corporation for National and Community Service Chapter XXV.**

Please visit http://www.americorps.gov/help/ac_sn_all/2010_Megasearch_Site.html for the AmeriCorps Regulations.

Provisions

• AmeriCorps Provisions, including revisions/changes.
Please visit http://www.nationalservice.gov/build-your-capacity/grants/managing-americorps-grants for the AmeriCorps Provisions.

Serve Idaho Commission on Service and Volunteerism

1. A Brief History of National Service

When faced with challenges, our nation has always relied on the dedication and action of its citizens. The Corporation for National and Community Service (CNCS) carries on a long tradition of citizen involvement by providing opportunities for Americans of all ages to improve their communities through service.

Revival of Interest in National and Community Service
President George H. W. Bush helped spark a revival of interest in national service when he instituted the White House Office of National Service in 1989. In 1990 Congress passed the National and Community Service Act, which created a Commission on National and Community Service whose mission was to "renew the ethic of civic responsibility in the United States." Full implementation began in 1992, when the commission awarded $64 million in grants to support four broad types of state and local community service efforts. These initiatives were the Serve-America programs (now Learn and Serve) which involved school-aged youth in community service and service-learning through a variety of school and community-based activities; Higher Education Innovative Projects aimed at involving college students in community service and at promoting community service at educational institutions; American Conservation and Youth Service Corps, supporting summer and year-round youth corps initiatives that engage both in- and out-of-school youth in community service work; and the National and Community Service Demonstration Models, for programs that were potential models for large-scale national service. The National Civilian Community Corps (NCCC), a demonstration program to explore the possibility of using post-Cold War military resources to help solve problems here at home, was enacted later as part of the 1993 Defense Authorization Act. It is a residential service program modeled on the Depression-era Civilian Conservation Corps and the United States military.

National and Community Service Trust Act
President Bill Clinton sponsored the National and Community Service Trust Act, a revision of the National and Community Service Act of 1990, which was passed by a bipartisan coalition of members of Congress and signed into law on September 21, 1993. The legislation created a new federal agency, the Corporation for National and Community Service (CNCS), to administer federally-funded national service programs. The law created AmeriCorps, which was designed to support local, state, and national organizations across the nation, involves Americans in results-driven community service. Individual AmeriCorps participants, known as members, serve for a year, during which they receive a living allowance. After service, members receive an education award, administered by the National Service Trust, and paid as a voucher redeemable for current education costs at colleges, universities, other post-secondary institutions, and approved school-to-work programs, or to pay back qualified student loans already incurred. The legislation drew on the principles of both the Civilian Conservation Corps and the GI Bill, encouraging Americans to serve and rewarding those who do. The new agency also took over management of the programs of two previous agencies, ACTION, which was responsible for running VISTA and the National Senior

Service Corps programs, and the more recent Commission on National and Community Service, including the NCCC, forming a new network of national service programs.

Service in the New Millennium
In his State of the Union address on January 29, 2002, President George W. Bush called on all Americans to serve their country for the equivalent of two years and announced the creation of the USA Freedom Corps, an umbrella network for volunteerism. A coordinating council housed at the White House and chaired by the President is working to expand and strengthen federal service programs like the Peace Corps, Citizen Corps, AmeriCorps, Senior Corps and Learn and Serve America, and to raise awareness of and break down barriers to service opportunities within all federal government agencies. Several bills have been introduced in Congress over the past three years to increase funding for national service and to reauthorize the National and Community Service Act.

On April 21, 2009, President Barack Obama signed the **Edward M. Kennedy Serve America Act** http://www.nationalservice.gov/about/serveamerica/index.asp. The Serve America Act reauthorizes and expands national service programs administered by the Corporation for National and Community Service, a federal agency created in 1993. The Corporation engages four million Americans in result-driven service each year, including 75,000 AmeriCorps members, 492,000 Senior Corps volunteers, 1.1 million Learn and Serve America students, and 2.2 million additional community volunteers mobilized and managed through the agency's programs. The Serve America Act reauthorizes and expands the mission of the Corporation for National and Community Service, by: increasing opportunities for Americans of all ages to serve, supporting innovation and strengthening the nonprofit sector, strengthening management, cost-effectiveness, and accountability within said entities.

2. Corporation for National and Community Service

 In 1993, the Corporation for National and Community Service was established. The Corporation was created to connect Americans of all ages and backgrounds with opportunities to give back to their communities and their nation. It merged the work and staffs of two predecessor agencies, ACTION and the Commission on National and Community Service. CNCS empowers and supports Americans to tackle persistent challenges such as helping youth succeed in school, securing safe affordable housing for economically disadvantaged families, or helping communities respond to disasters. Through this work, CNCS achieves its mission of improving lives, strengthening communities and fortifying the civic health of our nation.

CNCS' 2011 -2015 Strategic Plan (PDF) leverages the strength of grantees, participants, programs, state service commissions and the American public to build a network of programs that offer effective solutions in the six priority areas:
   1. Disaster Services
   2. Economic Opportunity
   3. Education
   4. Environmental Stewardship
   5. Healthy Futures
   6. Veterans and Military Families

They will produce these results by investing in effective local initiatives, engaging more Americans in service, supporting evidence-based programs, and leveraging public-private partnerships.

3. Corporation for National and Community Service Programs

Senior Corps: Senior Corps offers a network of programs that tap the rich experience, skills and talents of older citizens to meet community challenges.

AmeriCorps: Through its programs, AmeriCorps provides opportunities for Americans to make an ongoing, intensive commitment to service.

- **AmeriCorps State and National:** AmeriCorps*State and National offers grants that support a broad range of local service programs that engage thousands of Americans in intensive service to meet critical community needs. AmeriCorps*State and National also administers grants for Indian tribes and U.S. territories, who are eligible for funding that is set aside to address critical needs within their communities. *Serve Idaho administers AmeriCorps State grants in Idaho.*

- **AmeriCorps VISTA:** AmeriCorps*VISTA provides full-time members to community organizations and public agencies to create and expand programs that build capacity and ultimately bring low-income individuals and communities out of poverty.

- **AmeriCorps NCCC:** The AmeriCorps*National Civilian Community Corps is a full-time residential program for men and women aged 18-24 that strengthens communities while developing leaders through direct, team-based national and community service.

Social Innovation Fund: The Social Innovation Fund (SIF), an initiative enacted under the Edward M. Kennedy Serve America Act, is a new way of doing business for the federal government that stands to yield greater impact on urgent national challenges. The Social Innovation Fund targets millions in public-private funds to expand effective solutions across three issue areas: economic opportunity, healthy futures, and youth development and school support. This work will directly impact thousands of low-income families and create a catalog of proven approaches that can be replicated in communities across the country.

Volunteer Generation Fund: The Volunteer Generation Fund, a new program authorized by the Edward M. Kennedy Serve America Act, is designed to increase the number of people who serve in meaningful roles as volunteers dedicated to addressing important needs in communities across America.

Special Initiatives: The Corporation supports a variety of special initiatives and innovation grants.
- United We Serve / Serve.gov
- Martin Luther King, Jr. Day of Service
- President's Volunteer Service Award
- Other Special Initiatives

4. Serve Idaho Mission

"TO ENCOURAGE VOLUNTEERISM AND COMMUNITY SERVICE"
To achieve this mission Serve Idaho promotes collaborative efforts among private and nonprofit organizations, schools and state and local government agencies to advance national service programs and volunteerism throughout the state. We are here to Serve Idaho! http://serveidaho.gov/Home.aspx

Serve Idaho meets it mission through:
- Administration of Idaho's AmeriCorps grants to address critical community needs through a year of dedicated service.
- Leadership of Idaho's promise to ensure that young people have the resources they need to be successful.
- Hosting the annual Serve Idaho Conference on Service and Volunteerism to provide volunteer management and professional development training for national service members, volunteer administrators representing the public and private sectors, service-learning educators and community volunteers.
- The Governor's Brightest Star Awards to recognize Idaho's outstanding volunteers.
- Coordination with the Idaho Bureau of Homeland Security and Corporation for National and Community Service partner, the Federal Emergency Management Agency to implement a statewide plan to coordinate and setup spontaneous emergency volunteer reception centers in the event of Governor-declared state disasters.
- Leadership in national days of service including Martin Luther King, Jr. Day, AmeriCorps Week and September 11th Day of Service and Remembrance.
- Outreach to engage more persons with disabilities in national service and volunteerism.

5. History

Serve Idaho, The Governor's Commission on Service and Volunteerism, was established through Executive Order by Governor Cecil D. Andrus in 1994 as a result of the National and Community Service Trust Act of 1993 and the creation of AmeriCorps. The commission had two staff members and a governor-appointed commission comprised of 15 individuals representing diverse backgrounds and regions of the state.

The commission was established to advise and assist in the development and implementation of a comprehensive, statewide plan for promoting volunteer involvement and citizen participation in Idaho, as well as to serve as the state's liaison to national, state and community organizations which support the intent of the National and Community Service Trust Act.

Serve Idaho was formerly known as the Idaho Commission for National and Community Service. In 1994, the Serve Idaho Commission trained and gave the AmeriCorps pledge to its first class of 23 AmeriCorps members. The AmeriCorps members served in the Idaho TRiO AmeriCorps Program

through Lewis Clark State College and the Idaho State Parks in Education AmeriCorps Program through the Idaho Department of Parks and Recreation.

Serve Idaho has been housed with the Idaho State Board of Education and the Idaho Department of Correction. The commission joined the Idaho Department of Labor In July 2009. The Department of Labor serves as the host agency for the administration of the Serve Idaho Commission.

The Edward M. Kennedy Serve America Act, reauthorizing AmeriCorps, was passed in 2009 laying the groundwork for significant expansion of AmeriCorps and civic engagement activities nationwide. The work of the Serve Idaho Commission is anticipated to grow significantly over the coming years.

Serve Idaho is funded by grants from the Corporation for National and Community Service and through cash and in-kind donations from state and local partners. The Department of Labor provides generous matching funds and other administrative support to the commission. Serve Idaho does not receive general funds from the state.

The Corporation for National and Community Service provides federal funding for service-related programs and initiatives including AmeriCorps*State and National Grants program, AmeriCorps*VISTA, and Senior Service Corps. All of these programs strive to engage Americans of all ages and backgrounds in community-based service to address unmet critical needs in communities throughout the United States.

6. Corporation for National & Community Service Idaho State Office

This office is responsible for administering AmeriCorps*VISTA projects as well as the three Senior Corps programs. Kent Griffitts is the Program Director vgriffitts@cns.gov, 208-334-1645 and Collette Scheideler is the Program Specialist cscheide@cns.gov, 208-334-1646.

7. Collaboration

Collaboration is an intentional relationship between two or more individuals or organizations that come together to communicate, cooperate, and coordinate for the purpose of achieving common goals. These goals create shared values that enhance sustainable communities and citizen involvement.

The promotion of collaboration between the National Service Programs is a first priority in the process of creating support networks on both local and statewide levels. It is important that members and staff of the Serve Idaho Commission, Corporation for National & Community Service Idaho State Office, and members and staff of the national service program projects collaborate. **Expectations for Collaboration: AmeriCorps State programs will partner with other National Service members during AmeriCorps week. AmeriCorps State programs will invite and include other national service programs (VISTA, AmeriCorps National, Learn and Serve and Senior Corps) to trainings or conferences, as appropriate.**

8. 2014 Idaho Commissioner List

Commission Chair
Kristen Tracy
Boise, Volunteer Sector

1st Vice Chair
Mike Jensen
Boise, Youth Services

Secretary
Susan Steele
Moscow, National Service

Emily Baker
Boise, Volunteer

Clint Blackwood
Filer, Community-Based Agency

Patricia Lundquist Eriksen
Soda Springs, Human, Educational
and Environmental Services

Henry Henscheid
Blackfoot, Business Sector

Cindy Jesinger
Sun Valley, Community-Based Agency

Bill Langer
Coeur d'Alene, Senior Services

Pam McGarry
New Meadows, Business Sector

Lynn Muehlfeit
Idaho Falls, Labor Organization

Tina Naillon
State Department of Education
Learn and Serve Coordinator

Carrie Reese
Hayden Lake, Community Based Agency

Susan Steele
Moscow, National Service Program

Hunter Van Bramer
Moscow, Youth Commissioner

Jackie Wright
Boise, Community Based Agency

Ex-Officio Members

April Durrant
Idaho State Program Director
Corporation for National & Community Service

Lori Hendon
Legislative Audits

Ken Edmunds
Idaho Department of Labor Director

AmeriCorps Program Requirements

45 CFR Section 2522.100 Minimum Requirements that Every AmeriCorps Program, Regardless of Type, Must Meet

Although a wide range of programs may be eligible to apply for and receive support from the Corporation, all AmeriCorps subtitle C programs must meet certain minimum program requirements. These requirements apply regardless of whether a program is supported directly by the Corporation or through a sub-grant. All AmeriCorps programs must:

(a) Address educational, public safety, human, or environmental needs, and provide a direct and demonstrable benefit that is valued by the community in which the service is performed;

(b) Perform projects that are designed, implemented, and evaluated with extensive and broad-based local input, including consultation with representatives from the community served, participants (or potential participants) in the program, community-based agencies with a demonstrated record of experience in providing services, and local labor organizations representing employees of project sponsors (if such entities exist in the area to be served by the program);

(c) Obtain, in the case of a program that also proposes to serve as the project sponsor, the written concurrence of any local labor organization representing employees of the project sponsor who are engaged in the same or substantially similar work as that proposed to be carried out by the AmeriCorps participant;

(d) Establish and provide outcome objectives, including a strategy for achieving these objectives, upon which self-assessment and Corporation-assessment of progress can rest. Such assessment will be used to help determine the extent to which the program has had a positive impact:
> (1) On communities and persons served by the projects performed by the program;
> (2) On participants who take part in the projects; and
> (3) In such other areas as the program or Corporation may specify;

(e) Strengthen communities and encourage mutual respect and cooperation among citizens of different races, ethnicities, socioeconomic backgrounds, educational levels, both men and women and individuals with disabilities;

(f) Agree to seek actively to include participants and staff from the communities in which projects are conducted, and agree to seek program staff and participants of different races and ethnicities, socioeconomic backgrounds, educational levels, and genders as well as individuals with disabilities unless a program design requires emphasizing the recruitment of staff and participants who share a specific characteristic or background. In no case may a program violate the nondiscrimination, non-duplication and non-displacement rules governing participant selection described in part 2540 of this chapter. In addition, programs are encouraged to establish, if consistent with the purposes of the program, an intergenerational component that combines students, out-of-school youths, and older adults as participants;

(g)(1) Determine the projects in which participants will serve and establish minimum qualifications that individuals must meet to be eligible to participate in the program; these qualifications may vary based on the specific tasks to be performed by participants. Regardless of the educational level or background of participants sought, programs are encouraged to select individuals who possess leadership potential and a commitment to the goals of the AmeriCorps program. In any case, programs must select participants in a non-partisan, non-political, non-discriminatory manner,

ensuring fair access to participation. In addition, programs are required to ensure that they do not displace any existing paid employees as provided in part 2540 of this chapter;

(2) In addition, all programs are required to comply with any pre-service orientation or training period requirements established by the Corporation to assist in the selection of motivated participants. Finally, all programs must agree to select a percentage (to be determined by the Corporation) of the participants for the program from among prospective participants recruited by the Corporation or State Commissions under part 2533 of this chapter. The Corporation may also specify a minimum percentage of participants to be selected from the national leadership pool established under §2522.210(c). The Corporation may vary either percentage for different types of AmeriCorps programs;

(h) Provide reasonable accommodation, including auxiliary aids and services (as defined in section 3(1) of the Americans with Disabilities Act of 1990 (42 U.S.C. 12102(1)) based on the individualized need of a participant who is a qualified individual with a disability (as defined in section 101(8) of such Act (42 U.S.C. 12111(8)). For the purpose of complying with this provision, AmeriCorps programs may apply for additional financial assistance from the Corporation pursuant to §2524.40 of this chapter;

(i) Use service experiences to help participants achieve the skills and education needed for productive, active citizenship, including the provision, if appropriate, of structured opportunities for participants to reflect on their service experiences. In addition, all programs must encourage every participant who is eligible to vote to register prior to completing a term of service;

(j) Provide participants in the program with the training, skills, and knowledge necessary to perform the tasks required in their respective projects, including, if appropriate, specific training in a particular field and background information on the community, including why the service projects are needed;

(k) Provide support services—

(1) To participants who are completing a term of service and making the transition to other educational and career opportunities; and

(2) To those participants who are school dropouts in order to assist them in earning the equivalent of a high school diploma;

(l) Ensure that participants serving in approved AmeriCorps positions receive the living allowance and other benefits described in §§2522.240 through 2522.250 of this chapter;

(m) Describe the manner in which the AmeriCorps educational awards will be apportioned among individuals serving in the program. If a program proposes to provide such benefits to less than 100 percent of the participants in the program, the program must provide a compelling rationale for determining which participants will receive the benefits and which participants will not. AmeriCorps programs are strongly encouraged to offer alternative post-service benefits to participants who will not receive AmeriCorps educational awards, however AmeriCorps grant funds may not be used to provide such benefits;

(n) Agree to identify the program, through the use of logos, common application materials, and other means (to be specified by the Corporation), as part of a larger national effort and to participate in other activities such as common opening ceremonies (including the administration of a national oath or affirmation), service days, and conferences designed to promote a national identity for all

AmeriCorps programs and participants, including those participants not receiving AmeriCorps educational awards. This provision does not preclude an AmeriCorps program from continuing to use its own name as the primary identification, or from using its name, logo, or other identifying materials on uniforms or other items;

(o) Agree to begin terms of service at such times as the Corporation may reasonably require and to comply with any restrictions the Corporation may establish as to when the program may take to fill an approved AmeriCorps position left vacant due to attrition;

(p) Comply with all evaluation procedures specified by the Corporation, as explained in §§2522.500 through 2522.560;

(q) In the case of a program receiving funding directly from the Corporation, meet and consult with the State Commission for the State in which the program operates, if possible, and submit a copy of the program application to the State Commission; and

(r) Address any other requirements as specified by the Corporation.

Marketing and Outreach

Effective marketing helps programs recruit volunteers, secure partnerships, and raise money. When developing a plan, start with a mission statement, and then consider product, promotion, and tactics. Communicating effectively with the media helps programs reach potential participants and funding sources, educate the public, and promote program activities.

Every year, thousands of stories about Senior Corps, AmeriCorps, and Learn and Serve America appear in the media – almost all generated by local project staff and volunteers. Publicizing your program is not a goal in itself. It's a means of building support for your program and increasing your likelihood of success. Taking the time to communicate with the public helps attract resources from your community, including volunteers, sponsors, and funding, and helps educate people about your program. You don't have to be a media pro to get good coverage, but having some tips and resources can help http://www.nationalservice.gov/about/media_kit/index.asp.

Presentations and Published Material
When marketing your AmeriCorps program it must be acknowledged that it is funded in part by Serve Idaho and the Corporation for National and Community Service.

Publications required verbiage
Publications created by members or grant-funded staff are consistent with the purposes of the grant. The AmeriCorps logo is included on such documents. The program assures that the following acknowledgment and disclaimer appears in any external report or publication of material based upon work supported by this grant. "This material is based upon work supported by the Corporation for National and Community Service under AmeriCorps Grant No. ____. Opinions or points of view expressed in this document are those of the authors and do not necessarily reflect the official position of, or a position that is endorsed by, the Corporation for National and Community Service or the AmeriCorps program."

Program Dates

1. Federal Financial Report Due Dates 2013-2014

1st quarter **January 21, 2014**
For the period ending December 31, 2013 (include Aug. or Sept. depending on your 2013-14 program start date)

2nd quarter April 21, 2014
For the period ending March 31, 2014

3rd quarter **July 21, 2014**
For the period ending June 30, 2014

4th quarter **October 20, 2014**
For the period ending August or October 2014 depending on end date of 2013-14 program

2. AmeriCorps Progress Reports (APR) 2013-2014

4th quarter **October 15, 2013 for 2012-2013 grant year**
Cumulative report for the period ending August 31, 2013

1st quarter January 27, 2014
For the period ending December 31 2013 (only high risk and new programs)

2nd quarter **April 14, 2014**
For the period ending March 31, 2014 (all programs)

3rd quarter **July 14, 2014**
For the period ending June 30, 2014 (only high risk and new programs)

4th quarter **October 14, 2014** (all programs)
Cumulative report for the period ending August 31, 2014

3. Tentative Program Director Meetings

October 29, 2013
January 29, 2014
April 8, 2014
July 16, 2014

The Program Director meetings are mandatory. If the program director or a staff member is unable to attend from the AmeriCorps program please contact the Program Manager at 208-332-3578.

4. Tentative Program/Fiscal Site Visits

March 18, 2014 – Veterans serving Veterans
March 25, 2014 – PCEI
March 26 - 27, 2014 – LCSC
April 22, 2014 – LCSC Regional Office

1st Site visit TBD – 2nd Visit April 28, 2014 – Blackfoot Community Center
April 29 – April 30, 2014 - Healthcare for Family and Children
July or August TBA, 2014 - SCA

5. Miscellaneous Dates

Governor's Brightest Star Awards week of November 2014 - Egyptian

Serve Idaho Conference March 3-4, 2014 – Red Lion Boise, ID

> The Serve Idaho Conference is mandatory for the AmeriCorps members and program staff. If a member is unable to attend the program will need to provide an avenue for them to receive the pertinent training.

6. National Days of Service

FAMILY VOLUNTEER DAY

November 23, 2013— Be an Incredible Family—Volunteer!

Family Volunteer Day is to call families across America to work together in volunteer service to strengthen their families, communities, local businesses, and non-profit organizations. A program of Points of Light & Hands On Network, sponsored by Walt Disney Company.
For more information visit: http://www.pointsoflight.org/signature-events/family-volunteer-day

MARTIN LUTHER KING, JR. DAY

January 20, 2014—Make it a day ON…Not a day OFF!

Martin Luther King, Jr. day is to help keep Dr. King's legacy of service to others alive in communities across the country. Sponsors are the Corporation for National Service and the Points of Light & Hands On Network.
For more information visit www.MLKDay.org.

NATIONAL VOLUNTEER WEEK

April 6-13, 2014 – Inspire By Example!

National Volunteer Week is to recognize and celebrate the efforts of volunteers at the local, state and national levels. The sponsor is the Points of Light & Hands On Network.
For more information, contact: 1-800- VOLUNTEER

GLOBAL YOUTH SERVICE DAY (GYSD)

April 11-13, 2014 — The power of youth serving youth!

Global Youth Service Day is to empower young people, highlighting their ongoing contributions to their communities and mobilizing their energy, commitment, and idealism through sustainable service. Sponsors are Youth Service America, National Youth Leadership Council, Parade Magazine, and 49 national partner organizations including the Points of Light & Hands On Network and 13 sponsors including AT&T.
For more information visit www.YSA.org/GYSD.

JOIN HANDS DAY

May 3, 2014 —Youths and Adults Volunteering Together!

Join Hands Day is a day that brings youths and adults together to improve their own communities. Sponsors are America's Fraternal Benefit Societies.
For more information visit www.JoinHandsDay.org.

AMERICORPS WEEK

TBD 2014 – Celebrate AmeriCorps!

AmeriCorps Week is a recruitment and recognition event designed to bring more Americans into service, salute AmeriCorps members and alums for their powerful impact, and thank the community partners who make AmeriCorps possible. AmeriCorps Week provides an opportunity for AmeriCorps members, alums, grantees, program partners, and friends to shine a spotlight on the work done by members in communities across the country -- and to motivate more AmeriCorps to join AmeriCorps or volunteer in their communities. For more information visit
http://americorpsweek.gov/pages/about/about.asp

MY GOOD DEEDS.ORG

September 11—I Remember. I Serve.

My Good Deeds is to encourage people everywhere to set aside time every September 11 to help others in need - in any fashion they deem appropriate - in honor of those who lost their lives as a result of the terrorist attacks against America. Sponsors are One Day's Pay in partnership with Points of Light & Hands On Network, Youth Service America and Citizen Corps.
For more information visit http://www.mygooddeed.org/

MAKE A DIFFERENCE DAY

October 25, 2014—National Day to Help Others!

Make a Difference Day is to inspire and reward volunteers. Everyone who helps others on this day and submits an entry form is eligible for a national or local award and for a cash donation to a charitable cause. Every award recipient will appear in USA WEEKEND Magazine and on makeadifferenceday.com. Sponsors are USA WEEKEND Magazine and the Points of Light Hands On Network.
For more information visit www.MakeADifferenceDay.com

Member Management

1. Recruitment

Local recruitment and selection
As an AmeriCorps program, you must actively seek to recruit program members from the community in which the project is conducted. Members of diverse races and ethnicities, socioeconomic backgrounds, education levels, both men and women, and individuals with disabilities, unless and to the extent that the approved program design requires emphasizing the recruitment of staff and members who share a specific characteristic or background. However, in no case may you violate the nondiscrimination and non-displacement rules governing participant selection.

My AmeriCorps - Your Online AmeriCorps Recruitment System
To assist you in reaching a national pool of potential members, you can list your program opportunities and select applicants online. You will access the recruitment system through eGrants. If you are new to AmeriCorps, you will need to register to get an eGrants account. You will then need to contact the person in your agency who created the AmeriCorps eGrants account (Grant Administrator) to be given the capability to use the recruitment features. Then you are ready to begin posting opportunities, searching for applicants based on your needs, contacting applicants, reviewing applications and selecting your volunteers.

For more information, refer to Attachment 34. F or visit https://questions.nationalservice.gov/ to ask a question and/or https://www.nationalserviceresources.gov/encorps-resources-support-member-recruitment-and-development.

Position Descriptions
Service assignments must be meaningful to the AmeriCorps member (a function of the placement and recruit matching system) and the community in which the service is performed. The goals of each position must be achievable. Members must be connected with people in the local community so ownership of the experience will be shared, ultimately assumed by the local community, and consequently, long lasting. Everyone must have true involvement (input and control) in the work. Projects must be possible within the time available (project duration, resources, terms of service, etc.).

Position descriptions should include all professional elements necessary to define the service assignment and the qualifications necessary to achieve it. Typically, position descriptions are too short, non-existent, unfamiliar to the AmeriCorps member, or filed away and never used once a project is begun. These documents should be revisited regularly to encourage member feedback, measure success and find areas which need enhancement. They should be modified to reflect changing needs as they develop and are useful in evaluating members' performance.

Team Leader is a role/title that is recognized by AmeriCorps
The National and Community Service Act, as amended, provides for approved national service positions to include a " position involving service as a crew leader in a youth corps program or a similar position supporting a national service program that receives an approved national service position" 42 U.S.C § 12573(6). This language allows programs, in addition to youth corps, to use AmeriCorps members to provide an additional layer of leadership and support for members under certain conditions. The following is guidance on the use of AmeriCorps members as Team Leaders. Because of the need to ensure that Team Leader functions and staff functions remain clearly distinct,

Corporation program officers may request a description of Team Leaders' roles and responsibilities. ***Team Leaders are not permitted to act in a staff capacity***. Supervising members is a staff responsibility. Team Leaders must not be responsible for program development and coordination, however, they may assist by providing information and resources on best practices or by helping to develop portions of the program such as the training curriculum. In essence, under no circumstances should an AmeriCorps member serving as a Team Leader be the individual legally responsible for the program or other members. The Team Leader position description should predominantly include activities that involve them in performing direct service or providing support to members engaged in direct service.

*Examples of allowable Team Leader activities: *
- Working alongside members performing direct service, to serve as a model and to provide on the spot assistance
- Training members; providing guidance to members; providing support to members, including reflection exercises, conflict resolution, advice for transitioning out of AmeriCorps, etc.
- Arranging member development activities
- Building a sense of esprit de corps and general team cohesion among members
- Leading monthly/weekly meeting of members
- Leading and facilitating team service projects
- Working with the community to develop partnerships, including community volunteers, that will support the members' projects
- Communicating with program staff, site supervisors, and other members to ensure the execution of a quality program that is consistent with the AmeriCorps provisions

While Team Leaders are not to serve as the program's administrative staff, they may be engaged, on a limited basis, in activities that support the administration of the AmeriCorps program. These include:
- Raising funds or in-kind contributions in direct support of specific AmeriCorps projects, such as team service projects. See the AmeriCorps Provisions for greater detail regarding members and fundraising
- Participating in recruitment activities for new members

*Examples of unallowable Team Leader activities: *
- Signing member timesheets
- Evaluating member performance
- Disciplining AmeriCorps members
- Enrolling/dismissing AmeriCorps members
- Writing and/or signing program reports
- Managing the program's payroll and budget

AmeriCorps Recruitment 101- Russ Donahue
A successful recruitment strategy is the foundation for a thriving AmeriCorps program. AmeriCorps programs live and die by how well they network. The individuals you select and place within the community represent your program every day; their interactions either enhance or detract from your organization's reputation. Following are a number of important approaches that help develop a solid cadre of new members.

The first thing directors need to realize is that recruitment is not an event, but a process. Part of a solid recruitment plan includes frequent presentations to local high schools, colleges, fraternal

organizations, parent-teacher organizations, governmental agencies, military spouse groups, and similar associations. These should be scheduled and held at least monthly. Obviously not all applicants will meet the basic criteria, but increasing the number of applicants does allow for a more selective screening process.

The second most effective recruitment tool is your current members! Utilizing members to assist in this process yields enormous payoffs, and encouraging them to talk about their experiences is an excellent advertising instrument. Have members accompany you when making community presentations to allow those interested in joining AmeriCorps to ask direct questions of those already serving within the community. Sometimes members recruit individuals from within their immediate family, among friends and acquaintances, and even from informal conversations with people living in the community. No matter how well we illustrate national service positions through job descriptions, outreach, interviews, and advertising, allowing interested parties the opportunity to hear from current members helps prevent "sticker shock" once an individual becomes a member. Realistic expectations lead to greater member satisfaction—and higher rates of retention—during the program year.

After receiving applications, screening and placement of members is the next most critical step an AmeriCorps supervisor or director faces. After screening out clearly unqualified applicants (such as those who don't pass criminal background checks or fail to meet standards or stated qualifications), it's important to involve host agencies who will work directly with new members. This allows for a "second look" at the applications by an involved party, creates buy-in with the host agency staff, and adds another level of assessment for specific talents or skills that a director or supervisor may not be looking for during the initial screening.

Once the potential candidates are agreed on, the next step is to decide how to conduct the interviews. We generate a list of potential questions to ask each candidate, agree on which ones to use, and then commit them to writing so that each applicant is asked the same questions. This ensures all prospective members are treated equally and fairly, allowing for an "apples to apples" comparison when evaluating multiple candidates after the interviews. It is definitely worth considering including host agency staff in the interview process; this creates buy-in from the host agency and adds another level of insight for those candidates with similar qualifications. During the interviews good note-taking is crucial, especially if you interview many candidates. Don't rely on your memory to supply the details!

For additional information visit the website below:
http://www.nationalserviceresources.org/ask-expert-russ-donahue-%E2%80%94-americorps-recruitment-101

2. Enrollment and Retention Rates

The Corporation for National and Community Service (CNCS) has the following expectations:

ENROLLMENT RATE = Total slots filled/total slots awarded.
Enrollment for programs should be 100%.

RETENTION RATE = Total members exiting with an Education Award/total slots filled.
A target of 100% for retention or completion is desired.
CNCS realizes that many programs not yet meeting these rates are nevertheless performing well in their individual circumstances. Also, retention may vary among effective programs depending on the

target populations for those programs. However, in order to leverage limited program dollars, CNCS expects programs to strive toward improving their rates of enrollment and retention. During the application process, programs that are not meeting these standards need to offer a rationale for why not, as appropriate.

Recruitment/Retention Rate Calculation
To calculate enrollment and retention using the data in My AmeriCorps:
1. Log into your account via eGrants
2. Select S/N Reports
3. Select Report via pull down menu
4. Select Program year
5. Select format (PDF, Excel etc.)
6. Select Submit
7. You may open or save the report created

3. ADA Accommodations

In compliance with the Americans with Disabilities Act (ADA) (42 U.S.C. 12101, et seq.), programs must provide reasonable accommodations to the known mental or physical disabilities of members, and all selections and project assignments must be made without regard to the need to provide reasonable accommodations. As a Program Director, you may be called upon to make decisions regarding reasonable accommodation. However, the law does not require that you provide reasonable accommodations for any participant who would pose a direct threat to the health and safety of others even if accommodated. For more information, please contact Serve Idaho's Program Manager.

Reasonable Accommodation Request Policy and Procedure
It is the policy of Serve Idaho to provide reasonable accommodation to qualified individuals with disabilities, unless providing the accommodation would cause undue hardship. When considering a request for accommodation by an individual with a disability, it is appropriate to determine the ability of the person to perform the essential functions of the job with or without reasonable accommodation. A request for medical verification of the disability of the person requesting accommodation may be necessary.

Serve Idaho has established a system to process and track reasonable accommodation requests for qualified members with disabilities who are enrolled in an AmeriCorps formula or competitive state program. Reasonable accommodation requests should be in writing and initiated by the individual requesting the accommodation as follows.

AmeriCorps member request for a special accommodation(s):
1. The member fills out the **Reasonable Accommodation Request form** - **Attachment 1**
2. The program director will review, sign and forward the request form (marked confidential) to:
      Program Manager
      Serve Idaho – Idaho Dept. of Labor
      317 W. Main St.
      Boise Idaho 83735
3. Once Serve Idaho's Program Manager receives the confidential request form; the following factors will be taken into account:
- Will the reasonable accommodation enable the individual to perform the essential functions of the position?

- Is the accommodation an undue hardship to Serve Idaho?
  - Type and cost of the accommodation needed
  - Impact of the accommodation on the disability inclusion funds available to Serve Idaho
  - Overall size of the program requesting funds, with respect to the number of AmeriCorps members, and the number, type and location of its facilities
- Is the cost of the accommodation reasonable?
- Will the accommodation benefit other AmeriCorps members?
- Will the accommodation fundamentally alter the program design?

4. The Program Manager will contact the program within 10 days of receiving the request.
5. If the request is deemed reasonable, the Program Manager will sign the Reasonable Accommodation Request form, facilitate receipt of the accommodation and pay for the associated costs.

Disability Benefits Question:
If a potential AmeriCorps member/AmeriCorps member has questions about how AmeriCorps benefits will affect Disability benefits have them contact James Turner, DisAbility Rights Idaho 208-336-5353 ext. 33 or 1-800-632-5125

4. Verifying Identity and Citizenship of Members

By law, to serve in an approved AmeriCorps position, an individual must be a citizen, national, or lawful permanent alien of the United States (42 U.S.C. 12602(a)(3)).

Starting on August 28th, 2013 if an individual's information cannot be automatically verified by the Social Security Administration, AmeriCorps State and National grantees will no longer receive an email requesting them to fax documentation to the National Service hotline. AmeriCorps State and National grantees will instead receive an email notifying them that the individual's SSN and citizenship could not be verified and that the grantee needs to obtain and review copies of the required documentation to keep in the individual's physical file. Any SSN and citizenship verification emails that AmeriCorps State and National grantees received prior to August 28th will still require the grantee to review and fax documentation to the National Service hotline.

If the individual or grantee wishes to update the individual's name, date of birth, or social security number in the My AmeriCorps system, they will still need to fax in documentation so that the updates can be made. Individuals may have difficulty using their Segal AmeriCorps Education Award if this information in the system is incorrect.

For additional information regarding this change, please visit http://www.nationalservice.gov/official-forms/identity-and-citizenship-verification-process-faqs.

Identity and Citizenship Process Verification FAQs – Attachment 35

If after reviewing the FAQs you have additional questions, please contact the National Service Hotline at 1-800-942-2677 or fill out a webform at https://questions.nationalservice.gov/

5. Background Checks

Under the Serve America Act (SAA), all sub-grantees must conduct criminal history checks on participants in AmeriCorps, as well as on all AmeriCorps program staff and site supervisors and others who receive a salary, national service education award, living allowance, or stipend under the AmeriCorps grants, even if the activities don't involve service with vulnerable populations. The new requirements took effect on October 1, 2009. Beginning in April 2011, programs will also be required to conduct FBI background checks on covered individuals who will be working with vulnerable populations.

There is a two part check for those not dealing with a vulnerable population:
      1. State criminal history check.
      2. National Sex Offender Public Registry (NSOPR)

There is a three part check for those dealing with a vulnerable population:
      1. State criminal history check.
      2. National Sex Offender Public Registry (NSOPR)
      3. FBI fingerprint check

Background check policy FAQ's – Attachment 2
Requests for approval of Alternative Criminal History Check Search Procedures – Attachment 3

Background checks resources:

NSOPR www.NSOPR.gov/ The Dru Sjodin National Sex Offender Public Website (NSOPW), coordinated by the U.S. Department of Justice, is a cooperative effort between jurisdictions hosting public sex offender registries ("Jurisdictions") and the federal government and is offered free of charge to the public. These Jurisdictions include the 50 states, U.S. Territories, the District of Columbia, and participating tribes. The Website provides an advanced search tool that allows a user to submit a single national query to obtain information about sex offenders; a listing of public registry Web sites by state, territory, and tribe; and information on sexual abuse education and prevention.

Idaho State Police http://isp.idaho.gov/BCI/ is the only CNCS approved resource for State Criminal History and FBI fingerprint checks. For additional information please see the **Idaho State Police Fingerprint Program – Attachment 4** or contact ISP 208-884-7130.

For additional information: http://www.nationalserviceresources.org/national-service-criminal-history-check-resources

6. Nondiscrimination Laws

All programs must comply with all applicable provisions of state and federal laws and Regulations pertaining to nondiscrimination, sexual harassment, and equal employment opportunity including, but not limited to, the following law and regulations and all the subsequent amendments thereto:
(a) An individual with responsibility for the operation of a project that receives Corporation assistance must not discriminate against a participant in, or member of the staff of, such project on the basis of race, color, national origin, sex, age, or political affiliation of such participant or member, or on the basis of disability, if the participant or member is a qualified individual with a disability.

(b) Any Corporation assistance constitutes Federal financial assistance for purposes of title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d et seq.), title IX of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.), section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), and the Age Discrimination Act of 1975 (42 U.S.C. 6101 et seq.), and constitutes Federal financial assistance to an education program or activity for purposes of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.).

(c) An individual with responsibility for the operation of a project that receives Corporation assistance may not discriminate on the basis of religion against a participant in such project or a member of the staff of such project who is paid with Corporation funds. This provision does not apply to the employment (with Corporation assistance) of any staff member of a Corporation-supported project who was employed with the organization operating the project on the date the Corporation grant was awarded.

(d) Grantees must notify all program participants, staff, applicants, and beneficiaries of:

(1) Their rights under applicable federal nondiscrimination laws, including relevant provisions of the national service legislation and implementing regulations; and

(2) The procedure for filing a discrimination complaint with the Corporation's Office of Civil Rights and Inclusiveness.

[59 FR 13808, Mar. 23, 1994, as amended at 73 FR 53752, Sept. 17, 2008]

7. Member Service Agreement

The standard member service agreement in particular should be reviewed carefully to ensure that it contains the following items:
- The minimum number of service hours and other requirements (as developed by the Program) necessary to successfully complete the term of service and to be eligible for the education award;
- Start and end dates of the member's term of service
- Amount of the living allowance
- How the member will be paid
- Acceptable conduct
- Description of the other benefits available to the member
- Standards of conduct and sanctions for improper conduct
- Prohibited activities, including those specified in the regulations
- Requirements under the Drug-Free Workplace Act (41 U.S.C. 701 et seq.)
- Termination and suspension rules (including the specific circumstances under which a member can be released for cause)
- Position description for the member
- Grievance procedures
- Any other program-specific requirements
- Signatures of both the member and the program director

Member Service Agreement Template – Attachment 5

8. Member Orientation

Member orientation should prepare members for their year of service. Orientation can help them acquire the skills and knowledge they need to "get the job done". A strong orientation will pay off in program outcomes, with members who know the purpose of their service and have the skills to accomplish program objectives. The AmeriCorps Member Orientation Checklist is as follow:

Listed below are items the Corporation **mandates** to be covered in the orientation of members:
- **Member rights and responsibilities**
- **Specific skills and knowledge to perform service**
- **Program's code of conduct**
- **Prohibited Activities (page 35)**
- **Drug Free Workplace**
- **Suspension and Termination Rules**
- **Grievance Procedures**
- **Equal Opportunity, Affirmative Action, Non-Discrimination activities**
- **Sexual Harassment Awareness Education**
- **Specific Safety Procedures- member security**
- **Sensitivity to the Community**
- **Introduction to National Service and AmeriCorps**
- **My AmeriCorps Portal**
- **My Service Log Reporting (timesheets and approval process)**

Listed below are items the Commission **strongly encourages** to be included in the orientation of members:
- **National Service: The Big Picture (The AmeriCorps orientation video, "Getting Things Started" is a good tool to utilize)**
- **The History of Service in America**
- **Serve Idaho's role in AmeriCorps**
- **Host Sites**
- **AmeriCorps network of over 75,000 members**
- **Discussion of the AmeriCorps ethic**
- **Importance of Getting Things Done**
- **Responsibilities that individuals have to themselves, their families, their community, and the nation -civic responsibility and civic reflection**
- **Program Rules, Regulations, and Benefits**
- **Member Handbook**
- **Benefits**
- **Allowed Activities**
- **Living Allowance**
- **Staff and member roles**
- **Understanding the objectives of the program and how to collect data**
- **Have members fill out National Trust Enrollment Forms**
- **Eligibility of full time members for Health Care/Childcare**

9. Member Timesheets – My Service Log

Members will keep track of their time through My Service Log
http://www.idaho.myservicelog.org/main.taf?link=yes.

My Service Log Staff and Member guide instruction – Attachment 6

Sending a member or site supervisor a password
Your member records are available in My Service Log, and you can see their passwords on the
General tab of the Member Profile. Also on the General tab, you can use the 'Send Member
Password' option in the Available Actions dropdown to email the member's password to the account
email address.

Once you've entered your site supervisors you can refer to the guide under the 'Help' tab (in My
Service Log) – "How does a Site Supervisor get their password?" for instructions on how to obtain
the site supervisor password.

10. Member Files

Programs must maintain a member file for each member. It is recommended you purchase the file
folders with the two additional tabs in the center. For auditing purposes all AmeriCorps programs
need to maintain their files in the following order:

1st Tab
Member Contract (signed before commencement of service)
Member Service Description (job description)
Enrollment Form
Emergency Notification
Media Release
Documentation of Healthcare Enrollment or Waiver
Documentation of Childcare Enrollment (if applicable)
Documentation of Loan Forbearance or Waiver
High School Diploma or Self Certification
CPR Certification (if applicable)
Eligibility Forms
Documentation of Citizenship (if required)
Criminal History Check (State Criminal Repository Check, NSOPR, FBI Fingerprint)
Application, Parental Consent (if applicable)

2nd Tab
Performance Evaluations (Mid-Term and End of Term)
Verbal Written/Written Warnings

3rd Tab
End of Term/Exit Form
Exit Forms
Health Insurance Exit Form
Documentation of Compelling Personal Circumstances

Documentation of Release for Cause
Change of Status/Change of Term

4th Tab
Timesheets (if applicable)

11. Service Gear

Grant funds may be used to pay for a standard Service Gear package (AmeriCorps T-shirt, sweatshirt, hat, lapel pin) for members. Serve Idaho urges programs to provide this package to members. <u>If the standard Service Gear package is not purchased, Programs must provide Members with a comparable package</u>.
Items can be order online at http://gooddeed.org/americorps.aspx or http://www.nationalservicegear.org/programs/americorps

12. Material Request

Grant funds may be used to purchase informational material (brochures, application packets, posters, publications, etc.). On occasion, select items are free of charge.
Items can be ordered online at https://pubs.nationalservice.gov/.

13. Member Status

Member Commitment
The process of enrolling new members in My AmeriCorps begins with recording an applicant's commitment into the AmeriCorps Commitment Tracker (ACT). The Corporation for National and Community Service describes a commitment as follows:
A "commitment" is defined as signing a member service agreement with an individual or otherwise entering into a legally enforceable commitment as determined by state law.
The Corporation requires the program to enter the person in the AmeriCorps Commitment Tracker **within 30 calendar days of the commitment signing**. This serves to notify the Corporation of the agreement.

Member Enrollment
All Member Enrollment Forms must be entered and approved in My AmeriCorps **within 30 days of a member entering or enrolling in the program**. Members must create a My AmeriCorps Portal account in order to complete their enrollment.

Member Exit
All Member Exit Forms **must** be entered and approved in My AmeriCorps **within 30 days** of a member exiting the program. Members must create a My AmeriCorps Portal account in order to complete their exit information and to manage their education award. All members must complete their term of service within one year of their start date. This completion requirement is for all members. Members, who have had their term suspended, may increase their service agreement by the number of days suspended but not to exceed the Program year end date.

Change of Status

Programs **must** have approval from Serve Idaho prior to entering and approving a Change of Status Form in My AmeriCorps. Programs shall submit a written letter requesting approval. Refer to the AmeriCorps Provisions for policy guidance.

Release for Compelling Personal Circumstance

Conditions attributable to the program or otherwise unforeseeable and beyond the participant's control, such as a natural disaster, a strike, relocation of a spouse, or the nonrenewal or premature closing of a project or program, that make completing a term unreasonably difficult or impossible;

Those that the Corporation, has for public policy reasons, determined as such, including:

(A) Military service obligations;

(B) Acceptance by a participant of an opportunity to make the transition from welfare to work; or

(C) Acceptance of an employment opportunity by a participant serving in a program that includes in its approved objectives the promotion of employment among its participants.

Compelling personal circumstances do not include leaving a program:

(i) To enroll in school;

(ii) To obtain employment, other than in moving from welfare to work or in leaving a program that includes in its approved objectives the promotion of employment among its participants; or

(iii) Because of dissatisfaction with the program.

Suspension

As an alternative to releasing a participant, an AmeriCorps*State/National program may, after determining that compelling personal circumstances exist, suspend the participant's term of service for up to two years to allow the participant to complete service with the same or similar AmeriCorps program at a later time.

Release for cause

(1) A release for cause encompasses any circumstances other than compelling personal circumstances that warrant an individual's release from completing a term of service.

(2) AmeriCorps programs must release for cause any participant who is convicted of a felony or the sale or distribution of a controlled substance during a term of service.

(3) A participant who is released for cause may not receive any portion of the AmeriCorps education award or any other payment from the National Service Trust.

(4) An individual who is released for cause must disclose that fact in any subsequent applications to participate in an AmeriCorps program. Failure to do so disqualifies the individual for an education award, regardless of whether the individual completes a term of service.

(5) An AmeriCorps*State/National participant released for cause may contest the program's decision by filing a grievance. Pending the resolution of a grievance procedure filed by an individual to contest a determination by a program to release the individual for cause, the individual's service is considered to be suspended. For this type of grievance, a program may not—while the grievance is pending or as part of its resolution—provide a participant with federally-funded benefits (including payments from the National Service Trust) beyond those attributable to service actually performed, without the program receiving written approval from the Corporation.

(6) An individual's eligibility for a subsequent term of service in AmeriCorps will not be affected by release for cause from a prior term of service so long as the individual received a satisfactory end-of-term performance review as described in § 2522.220(c)(2) for the period served in the first term.

(7) Except as provided in paragraph (e) of this section, a term of service from which an individual is

released for cause counts as one of the terms of service described in § 2522.235 for which an individual may receive the benefits described in §§ 2522.240 through 2522.250.

Suspended service
(1) A program must suspend the service of an individual who faces an official charge of a violent felony (e.g., rape, homicide) or sale or distribution of a controlled substance.
(2) A program must suspend the service of an individual who is convicted of possession of a controlled substance.
(3) An individual may not receive a living allowance or other benefits, and may not accrue service hours, during a period of suspension under this provision.

Reinstatement
(1) A program may reinstate an individual whose service was suspended under paragraph (c)(1) of this section if the individual is found not guilty or if the charge is dismissed.
(2) A program may reinstate an individual whose service was suspended under paragraph (c)(2) of this section only if the individual demonstrates the following:

> (i) For an individual who has been convicted of a first offense of the possession of a controlled substance, the individual must have enrolled in a drug rehabilitation program;
> (ii) For an individual who has been convicted for more than one offense of the possession of a controlled substance, the individual must have successfully completed a drug rehabilitation program.

Release prior to serving 15 percent of a term of service
If a participant is released for reasons other than misconduct prior to completing 15 percent of a term of service, the term will not be considered one of the terms of service described in § 2522.220(b) for which an individual may receive the benefits described in § 2522.240 through § 2522.250.

Term of Service Limit
(a) *General limitation*. An individual may receive the benefits described in § 2522.240 through § 2522.250 for no more than four terms of service in an AmeriCorps State and National program, regardless of whether those terms were served on full-, part-, or reduced part-time basis.
(b) *Early release*. Except as provided in paragraph (c) of this section, a term of service from which an individual is released for compelling personal circumstances or for cause counts as one of the terms of service for which an individual may receive the benefits described in § 2522.240 through § 2522.250.

Note: If you make any changes to My AmeriCorps, you must add that same information to the member file. The My AmeriCorps system and the member files should include the same information.

14. Member Slots

The allowable slot types and associated FTEs are listed in the table below.

Service Term	Service Hours	MSY's
Full Time (FT)	1700	1
Half Time (HT)	900	.5
Reduced Half Time (RHT)	675	0.38
Quarter Time (QT)	450	0.26
Minimum Time (MT)	300	0.21

Slot Conversions
Serve Idaho may approve occasional changes of currently enrolled members to lesser-term slots. The program must submit a written request to Serve Idaho for a slot conversion. Serve Idaho and the program must take into account the impact on the program quality. The Corporation for National and Community Service (CNCS) will not cover health care or childcare costs for less than full-time members.

Programs may not request a transfer of currently enrolled members to a lesser-term status simply to provide a pro-rated education award if the member would otherwise be released for cause. It is also not allowed to request to convert a slot to a lesser-term slot at the end of a member's term of service in order to award a pro-rated education award when the member has not completed the hours required by their original term.

Changing less than full-time members to a greater slot type is discouraged because it is very difficult to manage, unless done very early in the member's term of service. Serve Idaho may approve such changes only in extenuating circumstances as long as the program's current budget can accommodate such changes. The program must request the slot conversion in writing. Keep in mind that a member's minimum 1700 hours must be completed within 12 months of the member's original start date.

Unfilled Slot Conversions
Programs must request an unfilled slot conversion request in writing to Serve Idaho. For example one full-time position can be converted to up to three quarter-time positions. All conversions must be Trust neutral, are subject to availability of funds in the Trust, and must comply with all assumptions on which Trust prudence and continued solvency are predicated. The total number of MSYs and education award amounts in the grant may not increase as a result of the slot conversion.
For example:
- 1 full-time member position (1 MSY) may be converted into 2 half-time slots (2 x .5 members = 1 MSY).
- 1 full-time member position may not be converted into 4 quarter-time positions as the education awards would total more than the original (4 X .2646); in this example, the maximum number of allowable quarter-time positions would be 3.

Here is a chart of MSY values:

Service Term	Service Hours	MSY's
Full Time (FT)	1700	1
Half Time (HT)	900	.5
Reduced Half Time (RHT)	675	0.38
Quarter Time (QT)	450	0.26
Minimum Time (MT)	300	0.21

Grantees may also combine and convert less than full-time positions to full-time positions as long as such changes do not increase the total MSYs or total education award amounts awarded in the grant.

Refill Slots
Eligible AmeriCorps State and National programs that have fully enrolled their awarded member slots are allowed to replace any member who terminates service before completing 30 percent of his/her term (effective May 17, 2007) provided that the member who terminates is not eligible for and does not receive a pro-rated education award. Programs may not refill the same slot more than once.

As a fail-safe mechanism to ensure that the Corporation for National and Community Service (CNCS) resources is available in the national service trust to finance any member's education award, CNCS will suspend refilling if either:
- Total AmeriCorps enrollment reaches 97 percent of awarded slots
- The number of refills reaches five percent of awarded slots.

15. Tutoring Requirements

A tutor is defined as someone whose primary goal is to increase academic achievement in reading or other core subjects through planned, consistent, one-to-one or small-group sessions and activities that build on the academic strengths of students in kindergarten through 12th grade, and target their academic needs. A tutor does not include someone engaged in other academic support activities, such as mentoring and after-school program support, whose primary goal is something other than increasing academic achievement. For example, providing a safe place for children is not tutoring, even if some of the program activities focus on homework help.

§ 2522.940 – A program in which members engage in tutoring for children must:
    (a) Articulate appropriate criteria for selecting and qualifying tutors, including the requirements in §2522.910 of this subpart;
    (b) Identify the strategies or tools it will use to assess student progress and measure student outcomes;
    (c) Certify that the tutoring curriculum and pre-service and in-service training content are high-quality and research based, consistent with the instructional program of the local educational agency or with State academic content standards;
    (d) Include appropriate member supervision by individuals with expertise in tutoring;
    (e) Provide specialized high-quality and research-based, member pre-service and in-service training consistent with the activities the member will perform;
    (f) Curriculum must be consistent with both state academic standards and the instruction program of the local educational agency.
    (g) Certify that members serving as tutors possess a minimum of a high school diploma.

§ 2522.920 – Exceptions to the qualifications requirements
The qualifications requirements in §2522.910 of this subpart do not apply to a member who is a K–12 student tutoring younger children in the school or after school as part of a structured, school-managed cross-grade tutoring program.

16. Living Allowance

A program must provide a *minimum living allowance of $12,100* per year with a maximum of $24,200 per year to your full-time members.

A living allowance *is not required for less than full-time members*. If you choose to provide less than full-time members with a living allowance, you may use the following chart as a guide.

Term of Service	Minimum # of Hours	Maximum Total Living Allowance	MSY
Full Time	1700	$24,200	1
Half Time	900	$12,800	.50
Reduced Half Time	675	$9,600	.38
Quarter Time	450	$6,400	.26
Minimum Time	300	$4,300	.21

17. Education Award

Amount of the AmeriCorps Education Award
The amount of the AmeriCorps Education Award depends on the length of a member's term of service. The current amount of the Education Award for each term of service is as follows:

Enrollment Status	Hours	Award
Full Time	1700	$5,550
Half Time	900	$2,775
Reduced Half Time	675	$2,114
Quarter Time	450	$1,468
Minimum Time	300	$1,175

Payments made from AmeriCorps Education Awards are considered taxable income in the year that the Corporation makes the payment to the school or loan holder. A member serving in a full-time term of service is required to complete service within 9 to 12 months.

Eligibility
Members are eligible for an AmeriCorps Education Award if they successfully complete their term of service in accordance with the member service agreement with an AmeriCorps State program.

As the member uses the AmeriCorps Education Award, they must have received a high school diploma, or the equivalent of such diploma.

Award Limitations
Under no circumstances will an individual be eligible to receive more than an amount equal to the aggregate value of two full-time education awards. The *value* of an education award is equal to the actual amount of the education award received divided by the amount of a full-time education award in the year the AmeriCorps position to which the award is attributed was approved. Each award received will be considered to have a value between 0 and 1. Although the *amount* of a full-time award as defined in § 2527.10 may change, the *value* of a full-time award will always be equal to 1.

The National Service Trust does not make payments to anyone other than qualified schools and loan holders. See your financial aid counselor for information on how they handle disbursements and reimbursements of the AmeriCorps Education Award.

Members have seven years to use the education award from the date of their completion of service. They can divide up their award and use portions of it at different times, as long as it is for authorized expenditures within the specified time period. Members could, for example, apply a portion of it to existing qualified student loans and save the remainder to pay for authorized college costs in the future.

Transfer of the Education Award § 2530.30

Request for Transfer
Before transferring an award to a designated individual, the Corporation must receive a request from the transferring individual, including—
(1) The individual's written authorization to transfer the award, the year in which the award was earned, and the specific amount of the award to be transferred;
(2) Identifying information for the individual designated to receive the transferred award;
(3) A certification that the transferring individual meets the requirements of paragraphs (a) through (c) of § 2530.10; and
(4) A certification that the designated individual is the child, grandchild, or foster child of the transferring individual.

Notification to Designated Individual
Upon receipt of a request including all required information listed above, the Corporation will contact the designated individual to notify the individual of the proposed transfer, confirm the individual's identity, and give the individual the opportunity to accept or reject the transferred award.

Acceptance by Designated Individual
To accept an award, a designated individual must certify that the designated individual is the child, grandchild, or foster child of the transferring individual and that the designated individual is a citizen, national, or lawful permanent resident alien of the United States. Upon receipt of the designated individual's acceptance, the Corporation will create or permit the creation of an account in the National Service Trust for the designated individual, if an account does not already exist, and the accepted amount will be deducted from the transferring individual's account and credited to the designated individual's account.

Timing of transfer
The Corporation must receive the request from the transferring individual prior to the date the award expires.

For additional information about the Education Award please contact the National Service Trust at 1-800-942-2677 or visit http://www.nationalservice.gov/programs/americorps/segal-americorps-education-award.

Segal Education Award – College/University Match
For a list of institutions that match the Segal AmeriCorps Education Award visit:
http://www.americorps.gov/for_individuals/benefits/ed_award_match.asp

18. Child Care

Programs must provide child care through an eligible provider or a child care allowance in an amount determined by the Corporation to those full-time participants who need child care in order to participate.

(1) Need. A participant is considered to need child care in order to participate in the program if:
    (i) Is the parent or legal guardian of, or is acting in loco parentis for, a child under 13 who resides with the participant;
    (ii) Has a family income that does not exceed 75 percent of the State's median income for a family of the same size;
    (iii) At the time of acceptance into the program, is not currently receiving child care assistance from another source, including a parent or guardian, which would continue to be provided while the participant serves in the program; and
    (iv) Certifies that he or she needs child care in order to participate in the program.

(2) Provider eligibility. Eligible child care providers are those who are eligible child care providers as defined in the Child Care and Development Block Grant Act of 1990 (42 U.S.C. 9858n(5)).

(3) Child care allowance. The amount of the child-care allowance may not exceed the applicable payment rate to an eligible provider established by the State for child care funded under the Child Care and Development Block Grant Act of 1990 (42 U.S.C. 9858c(4)(A)).

(4) Corporation share. The Corporation will pay 100 percent of the child care allowance, or, if the program provides child care through an eligible provider, the actual cost of the care or the amount of the allowance, whichever is less.

The criteria for member eligibility are contained in 45 C.F.R. §2522.250.

Childcare is provided by:
GAP Solutions Inc.
Toll-Free number (855) 886-0687
EMAIL: AmericorpsChildCare@gapsi.com
Fax: 1-800-521-5415

Send mail inquires
ATTN: AmeriCorps Childcare Program
12054 North Shore Drive
Reston, VA 20190

Visit http://www.americorpschildcare.com/ for the Child Care Application as well as specific

information regarding the childcare benefits.

19. Health Insurance

Programs must provide healthcare coverage to all eligible participants who meet the following requirements:
1. Be a full-time member
2. Is not otherwise covered by a health benefits package providing minimum benefits established by the Corporation at the time he or she is accepted into a program.
3. If, as a result of participation, or if, during the term of service, a participant demonstrates loss of coverage through no deliberate act of his or her own, such as parental or spousal job loss or disqualification from Medicaid, the participant will be eligible for health care benefits.

Programs may provide health insurance to less-than-full-time members serving in a full-time capacity, but they are not required to do so. A member is serving in a full-time capacity when the regular term of service will involve performing service on a normal full-time schedule for a period of six weeks or more. A member may be serving in a full-time capacity without regard to whether their agreed term of service will result in a full-time Segal AmeriCorps Education Award.

The Corporation for national and Community Service will not cover healthcare costs for family members.

Healthcare Coverage must:
> (i) Provide the minimum benefits determined by the Corporation;
> (ii) Provide the alternative minimum benefits determined by the Corporation; or
> (iii) Does not provide all of either the minimum or the alternative minimum benefits but that has a fair market value equal to or greater than the fair market value of a policy that provides the minimum benefits.

The Corporation for National and Community Service (CNCS) will pay no share of the cost of a policy that does not provide the minimum or alternative minimum benefits.

Programs may obtain healthcare from any provider as long as the coverage provided provides the following minimum benefits:
> a. Physician services for illness or injury
> b. Hospital room and board
> c. Emergency room
> d. X-ray and laboratory
> e. Prescription drugs
> f. Limited mental/nervous disorders
> g. Limited substance abuse coverage
> h. An annual deductible of no more than $250 charges per member
> i. No more than $1,000 total annual out-of-pocket per member
> j. A 20% co-pay or a comparable fixed fee with the exception of a 50% co-pay for mental and substance abuse care
> k. A maximum benefit of at least $50,000 per occurrence or cause

If the current AmeriCorps health plan does not meet the new consumer protection standards of the Affordable Care Act and members do not have other coverage, they may be required to pay a tax payment at the end of the year under the individual responsibility provision. For healthcare options

visit

20. Medicaid

Programs must provide health care coverage to all full-time members even if they are eligible for Medicaid. **Medicaid recipients are not waived from health care coverage.** The U.S. Department of Health and Human Services has taken the position that members receiving Medicaid have coverage available to them through AmeriCorps. Because Medicaid "wraps around" other available health care coverage, **Medicaid will pick up only the costs that are not covered under the AmeriCorps policy.** Members who remain on Temporary Assistance for Needy Families (TANF) will continue to receive Medicaid for their dependents. Members, who lose TANF due to the living allowance, usually can continue to receive extended Medicaid coverage for their dependents for up to one year. Members receiving these benefits should consult their caseworker before enrolling in AmeriCorps.

21. Loan Forbearance

AmeriCorps members who are earning a Segal AmeriCorps Education Award are uniquely eligible for one type of postponement of the repayment of their qualified student loan called forbearance. During the forbearance period, interest on the principle amount of the loan continues to accrue. If a member successfully completes their term of service and earns an Education Award, the National Service Trust will pay all or a portion of the interest that has accrued on the qualified student loans during this period. This accrued interest paid by the Trust, like the Segal AmeriCorps Education Award itself, is subject to income taxes.

AmeriCorps members enrolled in an AmeriCorps project are eligible for forbearance for most federally-backed student loans. For other types of student loans, members must ask their loan holder if their AmeriCorps service qualifies for a deferment or forbearance.

This postponement of the student loan payment (forbearance) is not automatic. Members must request it from their loan holders by completing the National Service Forbearance Request Form. Members may complete the Forbearance Request Form online by accessing their My AmeriCorps Portal.

The National Service Trust does not grant forbearances. Loan holders do. The Trust merely verifies membership in AmeriCorps and forwards the documents to the loan companies. The Trust is able to verify membership only when it has proof from a project that the individual is an AmeriCorps member.

Interest Accrual Payments
AmeriCorps members who have earned a Segal AmeriCorps Education Award are eligible to have the Trust pay up to 100% of the interest that accrued on their qualified student loan during their service. To have the Trust pay all or a portion of the interest accrued on a qualified student loans, the Trust must receive verification from the Program indicating the member has completed their service and are eligible for an award. A member and their lender also must complete the **Interest Accrual Form – Attachment** 7, which indicates the amount of interest accrued during your service period.

The loan holder sends this completed form to the Trust for payment.

For further information regarding Interest Accrual Payments, visit:
http://www.americorps.gov/for_individuals/benefits/benefits_ed_award_repayment.asp

Defaulted Loans
Most student loans that are in default are not eligible for forbearance. If a member has loans that have gone into default before they begin their AmeriCorps service, they can attempt to negotiate an arrangement with the loan holder or collection agency to bring the loan out of default so forbearance can be granted and interest paid.

My AmeriCorps Portal
In order to prevent a delay in the processing of interest payments, individuals must request payments electronically using our on-line system, My AmeriCorps. This is a secure, fast, and user friendly method for requesting interest payments to be remitted to your loan holders. It also provides electronic records of payments requested and paid and there are no forms to mail in.

The Corporation for National & Community Service cannot guarantee the prompt and accurate processing of requests for interest payments using paper forms. Payments requested by paper can take up to six months or more for processing and are less secure.

It is fast and easy to access your National Service Participant account in My AmeriCorps. To register, go to https://my.americorps.gov/mp/login.do and click on "Register to create a new Member/Alum account" and follow the instructions.

22. Prohibited Activities

The Corporation acknowledges that religious and political activities play a positive role in healthy communities, that religion and politics are defining characteristics of many community organizations (faith-based and secular), and that religious and political belief and action are central to many AmeriCorps members lives.

However, it is important that AmeriCorps programs and their members do not appear to be taking sides religiously or politically. Consequently, a number of limitations on the activities that AmeriCorps programs can support and in which members can engage while earning service hours, or when otherwise, representing AmeriCorps must be imposed. AmeriCorps members are free to pursue these activities on their own initiative, on non-AmeriCorps time, and using non-AmeriCorps funds.

The AmeriCorps logo should not be worn by members when participating in prohibited activities. While charging time to the AmeriCorps program, members accumulating service or training hours, or otherwise performing activities supported by the AmeriCorps program or the Corporation, staff and members may not engage in the following activities, and the grantee may not use grant funds to support the following activities:
> (1) Attempting to influence legislation;
> (2) Organizing or engaging in protests, petitions, boycotts, or strikes;
> (3) Assisting, promoting, or deterring union organizing;
> (4) Impairing existing contracts for services or collective bargaining agreements;
> (5) Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office;

(6) Participating in, or endorsing, events or activities that are likely to include advocacy for or against political parties, political platforms, political candidates, proposed legislation, or elected officials;

(7) Engaging in religious instruction, conducting worship services, providing instruction as part of a program that includes mandatory religious instruction or worship, constructing or operating facilities devoted to religious instruction or worship, maintaining facilities primarily or inherently devoted to religious instruction or worship, or engaging in any form of religious proselytization;

(8) Providing a direct benefit to—

     (i) A business organized for profit;

     (ii) A labor union;

     (iii) A partisan political organization;

     (iv) A nonprofit organization that fails to comply with the restrictions contained in section 501(c)(3) of the Internal Revenue Code of 1986 except that nothing in this section shall be construed to prevent participants from engaging in advocacy activities undertaken at their own initiative; and

     (v) An organization engaged in the religious activities described in paragraph (g) of this section, unless Corporation assistance is not used to support those religious activities;

(9) Conducting a voter registration drive or using Corporation funds to conduct a voter registration drive;

(10) Providing abortion services or referrals for receipt of such services; and

(11) Such other activities as the Corporation may prohibit.

Individuals may exercise their rights as private citizens and may participate in the activities listed above on their initiative, on non-AmeriCorps time, and using non-Corporation funds. Individuals should not wear the AmeriCorps logo while doing so.

23. Allowable Activities

After reading the list of prohibited activities there may still be questions about what kind of service work can be credited to AmeriCorps Education Awards hours.

The most important piece of information to relay to the members is that at least 80% of their time must be spent doing direct service, of which 10% can be spent fundraising. The other 20% can be credited to education and/or training that they receive that relates to their service or to AmeriCorps.

Direct service is work that addresses human need, the environment, public safety, and/or education in one form or another. It is working directly with people to make change, or doing work that is involved in making that direct change. It can be outreach, case management, training, teaching, tutoring, mediating, cleaning, counseling, recruiting volunteers, catching up on paperwork related to clients, preparing for class, coaching, listening, cooking, serving, providing health care, food, clothing, etc. Direct service hours should constitute 80% or more of an AmeriCorps member's total hours served. The remainder will be indirect service hours.

Indirect service hours, or education and training, hours are only applicable when they reflect the AmeriCorps service that the member credits to the education award he or she will receive. Any on-the job training that refers to direct service would be part of this category. All orientations, including

the AmeriCorps orientation, would be included, as well as any state or regional trainings, seminars, or workshops pertaining to issues related to direct service. Examples would be conflict resolution seminars, teacher development days, team-building exercises or a class on training techniques. Only 20% of the member's credited service hours can be dedicated to education and training, even if more hours have been spent in this area.

Fundraising Activities § 2520.40
AmeriCorps members may raise resources directly in support of your program's service activities.

Examples of fundraising activities AmeriCorps members may perform include, but are not limited to, the following:

(1) Seeking donations of books from companies and individuals for a program in which volunteers teach children to read;
(2) Writing a grant proposal to a foundation to secure resources to support the training of volunteers;
(3) Securing supplies and equipment from the community to enable volunteers to help build houses for low-income individuals;
(4) Securing financial resources from the community to assist in launching or expanding a program that provides social services to the members of the community and is delivered, in whole or in part, through the members of a community-based organization;
(5) Seeking donations from alumni of the program for specific service projects being performed by current members.

AmeriCorps members may not:

(1) Raise funds for living allowances or for an organization's general (as opposed to project) operating expenses or endowment;
(2) Write a grant application to the Corporation or to any other Federal agency.

Member Supervision

1. Grievance Procedure

All programs must establish a grievance procedure for members who believe that they have been unfairly released from the program and for other grievances filed by members or other interested parties. This grievance procedure should be attached to or part of the AmeriCorps member's service agreement. The procedure must include an opportunity for a hearing and binding arbitration within statutory deadlines. If the grievance alleges fraud or criminal activity, it must immediately be brought to the attention of the Corporation's inspector general.

To ensure all AmeriCorps programs are in compliance with federal regulations regarding grievance procedures, member files will be reviewed during monitoring site visits to ensure members have signed a grievance policy. Programs will be notified in writing of any required changes and given an appropriate time frame to complete those revisions.

Additionally, the Commission encourages programs to establish an alternative dispute resolution procedure, such as mediation. While a member is going through the grievance procedure, be sure to make it very clear what stage they are in, what the time-line is, and what the next steps are (i.e. whether they are in a mediation, grievance hearing or binding arbitration).

The following illustrates the timeframe that **must** be addressed in an AmeriCorps grievance procedure.

Alternative dispute resolution
(1) The aggrieved party may seek resolution through alternative means of dispute resolution such as mediation or facilitation. Dispute resolution proceedings must be initiated within 45 calendar days from the date of the alleged occurrence. At the initial session of the dispute resolution proceedings, the party must be advised in writing of his or her right to file a grievance and right to arbitration. If the matter is resolved, and a written agreement is reached, the party will agree to forego filing a grievance in the matter under consideration.
(2) If mediation, facilitation, or other dispute resolution processes are selected, the process must be aided by a neutral party who, with respect to an issue in controversy, functions specifically to aid the parties in resolving the matter through a mutually achieved and acceptable written agreement. The neutral party may not compel a resolution. Proceedings before the neutral party must be informal, and the rules of evidence will not apply. With the exception of a written and agreed upon dispute resolution agreement, the proceeding must be confidential.

Grievance procedure for unresolved complaints
If the matter is not resolved within 30 calendar days from the date the informal dispute resolution process began, the neutral party must again inform the aggrieving party of his or her right to file a formal grievance. In the event an aggrieving party files a grievance, the neutral may not participate in the formal complaint process. In addition, no communication or proceedings of the informal dispute resolution process may be referred to or introduced into evidence at the grievance and arbitration hearing. Any decision by the neutral party is advisory and is not binding unless both parties agree.

Time limitations
Except for a grievance that alleges fraud or criminal activity, a grievance must be made no later than one year after the date of the alleged occurrence. If a hearing is held on a grievance, it must be conducted no later than 30 calendar days after the filing of such grievance. A decision on any such grievance must be made no later than 60 calendar days after the filing of the grievance.

Arbitration
(1) Arbitrator
> (i) *Joint selection by parties.* If there is an adverse decision against the party who filed the grievance, or 60 calendar days after the filing of a grievance no decision has been reached, the filing party may submit the grievance to binding arbitration before a qualified arbitrator who is jointly selected and independent of the interested parties.
> (ii) *Appointment by Corporation.* If the parties cannot agree on an arbitrator within 15 calendar days after receiving a request from one of the grievance parties, the Corporations Chief Executive Officer will appoint an arbitrator from a list of qualified arbitrators.

(2) Time Limits
> (i) *Proceedings.* An arbitration proceeding must be held no later than 45 calendar days after the request for arbitration, or, if the arbitrator is appointed by the Chief Executive Officer, the proceeding must occur no later than 30 calendar days after the arbitrator's appointment.
> (ii) *Decision.* A decision must be made by the arbitrator no later than 30 calendar days after the date the arbitration proceeding begins.

(3) The cost
The cost of the arbitration proceeding must be divided evenly between the parties to the arbitration. If, however, a participant, labor organization, or other interested individual prevails under a binding arbitration proceeding, the State or local applicant that is a party to the grievance must pay the total

cost of the proceeding and the attorney's fees of the prevailing party.

Suspension of placement
If a grievance is filed regarding a proposed placement of a participant in a program that receives assistance under this chapter, such placement must not be made unless the placement is consistent with the resolution of the grievance.

Remedies
Remedies for a grievance filed under a procedure established by a recipient of Corporation assistance may include
      (1) Prohibition of a placement of a participant; and
      (2) In grievance cases where there is a violation of non-duplication or non-displacement requirements and the employer of the displaced employee is the recipient of Corporation assistance
            (i) Reinstatement of the employee to the position he or she held prior to the displacement;
            (ii) Payment of lost wages and benefits;
            (iii) Re-establishment of other relevant terms, conditions and privileges of employment; and
            (iv) Any other equitable relief that is necessary to correct any violation of the non-duplication or non-displacement requirements or to make the displaced employee whole.

Suspension or termination of assistance
The Corporation may suspend or terminate payments for assistance under this chapter.

Effect of noncompliance with arbitration
A suit to enforce arbitration awards may be brought in any Federal district court having jurisdiction over the parties without regard to the amount in controversy or the parties' citizenship.

Serve Idaho will ensure that grievance procedures address each of the following required components:
- Grievance filed within one year of alleged occurrence.
- Grievance hearing within 30 calendar days of filing a grievance.
- Decision made within 60 calendar days of filing a grievance.
- Hearing by person not involved in previous decisions on the issue.
- Grievant can request binding arbitration if decision is adverse to grievant or if decision is not reached within 60 calendar days.
- Binding arbitration hearing is held within 45 days after request for arbitration or within 30 days after CEO appoints arbitrator.
- There is a decision within 30 days of the binding arbitration hearing.
- Remedies include the applicant's selection or reinstatement and other changes in the terms and conditions of service.

The programs are accountable for making any needed revisions in their grievance procedure.

In formatting your own grievance procedure please see the AmeriCorps Provisions to make sure your grievance procedure follows appropriate guidelines.

NOTE: Programs are **required** to contact Serve Idaho if a member starts a grievance procedure process. The written grievance should be sent to Serve Idaho and any correspondence with the member should also be included.

Grievance Procedure Review Checklist – Attachment 8

2. Drug-Free Workplace

In accordance with the AmeriCorps Provisions, programs are required to give notice about the Drug-Free Workplace Act to members and to conduct a drug-free awareness program.
If a member is arrested for or convicted of a drug offense, he or she must notify the Program Director in writing within five (5) days. Appropriate action must be taken including suspension and referral to a drug rehabilitation program, or release for cause consistent with the Corporation for National and Community Service's rule on termination and suspension of service.
The conviction **must be reported to Serve Idaho**, in writing, within ten (10) days. Serve Idaho will then notify the Corporation for National and Community Service in writing.

3. Wage Garnishment

Any type of garnishment of the federal portion of a member's living allowance is not permitted due to issues of sovereign immunity. Sovereign immunity protects the property interests of the United States from suits to which it has not consented. The federal government has a continuing property interest in AmeriCorps grant funds until they are expended in accordance with the grant's terms. With respect to the living allowance, the Corporation has a property interest in the federal share of the member's living allowance, until the AmeriCorps member actually receives it, and this property interest is protected by sovereign immunity. Only Congress may waive this immunity.

Whether or not the non-federal portion of the living allowance–i.e. the funds provided as match at the program level–is subject to garnishment is a state law issue. Because the Corporation for National and Community Service is not a party to this action, and because it involves application of state law, programs should consult their own local counsel.

4. Member Timesheets

Serve Idaho will conduct random reviews of member timesheets during program site visits. If problems are found during the initial review such as inconsistent calculations, unauthorized timesheets, prohibited activities, etc., it will be considered a compliance issue and may require a complete review of all member timesheets.

The review of timesheets will include the following:
Do all timesheets include?
- Is the timesheet signed by the member after the last date of entry?
- Is the timesheet signed by the site supervisor after the member?
- Is the timesheet signed by the program director after the site supervisor?
- Does the timesheet have the appropriate approvals marked in My Service Log?
- Are members on target to attain their intended number of service hours?
- Are service activities listed on timesheets in line with the approved objectives and are not

prohibited activities?
- Do the timesheets clearly track the service activities to ensure adherence to the 20% rule relating to training?
- Do the timesheets clearly track the service activities to ensure adherence to the 10% rule relating to fundraising?
- Are timesheets current in My Service Log?

Public Assistance Programs

1. Food Stamps
A member's food stamp benefits are not affected because a member receives the AmeriCorps living allowance. This means that a member's benefits should not be decreased, increased, or terminated because he or she receives the living allowance. This is a federal rule and is the same in all states. http://healthandwelfare.idaho.gov/FoodCashAssistance/FoodStamps/tabid/90/Default.aspx for information regarding food stamp benefits

2. Public Housing
AmeriCorps members' benefits do not affect a member's eligibility for federal, need-based housing assistance, such as Section 8 housing and other federally subsidized housing. This means that the living stipend cannot be taken into consideration when a member applies for or if a member's eligibility for public housing is being re-examined. This is a federal rule and is the same in all states. **23. Federal Register, DOCID fr20ap01-79 – Attachment 9**

3. Unemployment Benefits
AmeriCorps members are **not entitled** to unemployment benefits. The Corporation for National and Community Service has interpreted federal legislation to mean that there is no employer-employee relationship between members and programs. Programs are not required to pay unemployment taxes.

4. Temporary Assistance to Needy Families (TANF)
Temporary Assistance for Needy Families (TANF) is a block grant program provided under the Social Security Act (SSA). Because TANF is under the SSA, the AmeriCorps State and National living allowance may be considered income for the purposes of determining eligibility for and the amount of aid under TANF. http://www.healthandwelfare.idaho.gov/ for information regarding TANF

5. Medicaid
Programs must provide health care coverage to all full-time members even if they are eligible for Medicaid. **Medicaid recipients are not waived from health care coverage.** The U.S. Department of Health and Human Services has taken the position that members receiving Medicaid have coverage available to them through AmeriCorps. Because Medicaid "wraps around" other available health care coverage, **Medicaid will pick up only the costs that are not covered under the AmeriCorps policy.** Members who remain on Temporary Assistance for Needy Families (TANF) will continue to receive Medicaid for their dependents. Members, who lose TANF due to the living allowance, usually can continue to receive extended Medicaid coverage for their dependents for up to one year. Members receiving these benefits should consult their caseworker before enrolling in AmeriCorps.

6. Supplemental Social Security

Supplemental Security Income (SSI) is a federal program that provides a monthly cash benefit to low-income individuals who are aged, blind, or who have a disability. Prior to the passage of the Heroes Earnings and Relief Tax Act of 2008 (HEART Act), receiving an AmeriCorps living allowance could disqualify an individual from eligibility. Under the HEART Act, the Social Security Administration will ignore an individual's receipt of AmeriCorps benefits for purposes of SSI eligibility. The Heart Act excludes "any benefit (whether cash or in-kind)" and so covers the living allowance, health insurance, child care, and the education award (and related interest payments).

Additionally, SSI recipients who serve in AmeriCorps State and National and National Civilian Community Corps automatically qualify for the Student Child Earned Income Exclusion if they meet applicable age and marital status requirements.

SSI recipients who are (1) under the age of 22 and (2) neither married nor the head of a household are eligible for the student earned income exclusion, which excludes from countable earned income $1,290 per month and up to $5,200 per year (amounts as of January 1, 2001). This exclusion may be combined with existing SSI work incentives and other income disregard rules, which should encourage more young people with disabilities to participate in AmeriCorps State and National and NCCC.

Note that the Student Child Earned Income Exclusion policy change does not affect AmeriCorps VISTA members, whose benefits are already fully excluded from income under section 404 of the Domestic Volunteer Service Act.

Any portion of an education award used by an SSI recipient to pay for tuition, fees, and other necessary education expenses (not including room and board, or repaying student loans) will not count as income. Any portion of the education award that is not used for tuition, fees, or other necessary educational expenses counts as income in the month that it is used. For general questions about SSI or the terms used in this answer, go to http://www.socialsecurity.gov/ssi/index.htm.

Reporting and Records Retention

Financial Management Provisions, Administrative Costs, Liability Insurance Coverage, and Termination of the Grant – Please refer to the AmeriCorps Provisions.

1. Match

Programs must meet proposed match **every quarter.**

Programs that are not meeting proposed levels of match at the end of a quarter should include the following comments in their Periodic Expense Report (PER) and Federal Financial Report (FFR):
- An explanation as to why match was not met, and
- Plans to meet match the next quarter.

Programs that do not meet match requirements and do not include comments in their PER and FFR reports will be required to submit a letter addressing the two issues noted above.

Corporation funds may be reduced by Serve Idaho for failure to meet the proposed or minimum match requirements. This would be done to bring the program in line with the match requirements as submitted in the application.

Programs must provide and account for the matching funds as agreed upon in the approved application. This means that the proposed match included in the application must be met even if it exceeds the minimum match requirement.

Cash or in-kind matching contributions that exceed the required minimum will be considered voluntary cost share. Programs that cannot meet the amount of voluntary cost share proposed in their application may submit a request to reduce the amount of cost share their program will contribute. However, the cost share/match cannot be reduced below the minimum percentage requirements as indicated above. See the budget modifications section for additional information.

Overall Cost Match
Subject to the requirements of § 2521.45, your overall share of program costs will increase as of the fourth consecutive year that you receive a grant, according to the timetable below:

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Minimum overall share	24%	24%	24%	26%	30%	34%	38%	42%	46%	50%

The program must have contributed matching resources by the end of a grant period in an amount equal to the combined total of the proposed or minimum overall annual match for each year of the grant period.

Alternative Match

If your program is unable to meet the match requirements and is located in a rural or a severely economically distressed community, you may apply to the Corporation for National and Community Service for a waiver that would require you to increase the overall amount of your share of program costs beginning in the seventh consecutive year that you receive a grant. Contact your Program Officer if you believe you meet the requirements and are interested in applying. If you receive the alternative match you will follow the timetable below:

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Minimum overall share	NA	NA	NA	NA	NA	NA	29%	31%	33%	35%

Administration Cost Match
Programs may bill a maximum 5.26% of the Corporation funds actually expended in the operation of the program to the administration line of the budget. However, Serve Idaho will retain 1.05% of the federal funds available to programs for administrative costs. The calculations are as follows:
1. To Determine the CNCS Share:
([Section I] + [Section II] x 0.0526) x (0.80) = Corporation fixed amount

([Section I] + [Section II] x 0.0526) x (0.20) = Commission fixed amount

2. To determine the Grantee share:
[Total amount of Section I] + [Total amount of Section II] x .10 = Corporation fixed amount
The Commission fixed amount for the grantee share will be $0

Serve Idaho will check the administrative cost calculations with each submitted draw down request. If the 5.26% or 10% is exceeded an adjustment in My Service Log and the draw request will be required before the draw down request is processed.

Federal Indirect Cost Match
If you have a federally approved indirect cost rate and choose to use it, the rate will constitute documentation of your administrative costs, including the 5% maximum payable by CNCS. Specify the Cost Type for which your organization has current documentation on file, i.e., Provisional, Predetermined, Fixed, or Final indirect cost rate. Supply your approved IDC rate (percentage) and the base upon which this rate is calculated (direct salaries, salaries and fringe benefits, etc.). It is at your discretion whether or not to claim your entire IDC rate to calculate administrative costs. If you choose to claim a lower rate, please include this rate in the Rate Claimed field.

1. Determine the base amount of direct costs to which you will apply the IDC rate, including both the CNCS and Grantee shares, as prescribed by your established rate agreement (i.e., based on salaries and benefits, total direct costs, or other). Then multiply the appropriate direct costs by the rate being claimed. This will determine the total amount of indirect costs allowable under the grant.

2. To determine the CNCS share: Multiply the sum of the CNCS funding share in Sections I and II by 0.0526. This is the maximum amount you can claim as the CNCS share of indirect costs.

3. To determine the Grantee share: Subtract the amount calculated in step b (the CNCS administrative share) from the amount calculated in step a (the Indirect Cost total). This is the amount the applicant can claim as grantee share for administrative costs.

2. Budget Modifications

Serve Idaho understands that AmeriCorps programs must sometimes modify their budget during the program year. These budget modification guidelines summarize the AmeriCorps Provisions on this issue. They are intended only as guidance and are not a substitute for the Provisions or other federal rules and regulations. For more information, please refer to the AmeriCorps Provisions.

Line Item Changes
Programs may move funds between line items if the amount moved is less than 10% of the total federal award. Keep in mind that *any budget modification must be approved by Serve Idaho before they are considered effective*. For example, a program that receives a $100,000 grant may move up to $10,000 between line items without approval from the Corporation for National and Community Service. *However the program must receive approval from Serve Idaho*. If a program needs to move over 10% of the total federal award the budget modification will need to be approved by the Corporation for National and Community.

Budget Modification Procedure

All changes to an approved AmeriCorps budget requires approval by Serve Idaho as described below. The following procedures should be followed for any revisions to the approved budget.

Policy Guidance:

Programs may reallocate funds within individual sections of the budget up to 10% of the section subtotal without prior approval by the Serve Idaho. The following exceptions require prior written approval from Serve Idaho:

- All budget revisions in Section II, Member Support Costs
- All budget reductions in Section I, "Member Training and Education"
- All budget revisions in Section I, Staff Salaries
- All budget revisions in Section I, "Corporation Sponsored Meetings"
- Specific costs requiring approval under the OMB super circular
- Purchases of equipment over $5,000 unless in approved application and budget

Programs should allow 3 weeks for action on budget revisions requiring prior written approval. Program staff may be contacted to clarify information. Requests beyond the approval authority of Serve Idaho will be forwarded to the Grants Office at the Corporation for National and Community Service for final approval. Please allow four weeks for response from the Corporation.

Programs must submit a budget revision worksheet within 30 days of any changes to the approved budget with a written narrative describing the changes.

Budget revisions must be in compliance with all grant guidelines and restrictions. Further guidance is available in the AmeriCorps provisions. Contact Serve Idaho's Program Manager for clarification of guidelines.

Procedure

1. Complete a revision request spreadsheet
2. Draft a narrative to describe the nature of the requested changes
3. Submit the spreadsheet and narrative to Serve Idaho for consideration
4. Allow 3 weeks for approval (if approval is required)
5. Maintain copy of revision spreadsheet signed by Serve Idaho staff
6. Adjust internal records as necessary

Serve Idaho Budget Revision Worksheet Instructions:

1. Request an electronic version of the worksheet from Serve Idaho
2. Enter desired changes to the budget in the columns titled "Revision"
   Enter the amount you want to add or subtract from a particular line item, for instance:
   > The original award shows $2,000 in the Travel line item and $4,500 in Equipment; and you want to move $500 out of Equipment and into Travel, you would enter 500 in the "Revision column under Travel and –500 in Equipment)
3. Totals will automatically be calculated based on revisions
4. Print completed form, sign and date and forward to Serve Idaho's Program Manager with narrative describing the requested changes

Approval Authority:

Authority for revisions to an AmeriCorps program budget is as follows:

1. Total of any and all budgetary changes in any single <u>Section</u> of the original approved budget in the Corporation Share, *less than or equal to 10% of that section subtotal*: **Program Director**
2. Total of any and all budgetary changes in the original approved budget, *less than or equal to 15% of total budget*: **Serve Idaho Program Manager**
3. Total of any and all budgetary changes in the original approved budget, *greater than 15% of the total budget*, and any changes to Member Costs*: The* **Corporation for National and Community Service Grants Officer**

Programs should not consider budget modification requests approved until written notice is received from Serve Idaho.

Sub-granting Funds
Programs must receive prior approval from Serve Idaho and the Corporation for National and Community Service to sub-grant or subcontract program activities not previously approved in the application for funding. Programs must receive prior approval from both Serve Idaho and the Corporation for National and Community Service to transfer the grant or to sub-grant to a different organization. For more information, please refer to the AmeriCorps Provisions.

Equipment
Programs may not purchase equipment costing more than $5,000 with grant funds unless specified in the approved budget or application without prior approval from Serve Idaho and the Corporation for National and Community Service. All purchases of equipment and supplies should be handled in accordance with OMB. For more information, please refer to the AmeriCorps Provisions.

Matching Funds/Voluntary Cost Share

Programs must provide matching funds as agreed upon in the approved application and budget. At a minimum, Programs must meet the proposed level of match every quarter. Programs that do not meet this match at the end of the quarter should include comments on their fiscal reports (both the Periodic Expense Report and Financial Status Reports, when applicable) explaining why the match was not met and how the program will ensure it will meet the match requirement at the end of the next quarter. If comments are not included, a letter from the program addressing these two issues will be required.

Voluntary cost share is defined as cash or in-kind matching contributions that exceed the required minimum levels of match as noted above. Programs will be held accountable for meeting the amount of voluntary cost share they proposed in their application. Programs who cannot meet the proposed levels of voluntary cost share must submit:
1. An email detailing the request and explaining why the modification is needed.
2. **A budget revision request form – Attachment 10**
Submit the above information to Serve Idaho and the Corporation for National and Community Service for approval. All programs are encouraged to raise funds from the private sector. For more information, please refer to the AmeriCorps Provisions.

3. Fiscal Reports and Draw Request

Periodic Expense Reports (PERs)

The PER's are due to Serve Idaho on a monthly or quarterly basis. This will need to be established at the beginning of the grant year, so it can be entered into My Service Log correctly. If a change needs to be made to the reporting period contact Serve Idaho's Program Manager. The Program Manager will need to approve the change and make the adjustment to the reporting period in My Service Log. The PER's will be due on the 15th of the month. <u>Should the 15th fall on a weekend, the reports are due the Friday prior to the weekend</u>. If the program cannot meet this deadline contact Serve Idaho's Program Manager.

Serve Idaho will issue a reimbursement payment based on timely monthly expense reports submitted by programs. The monthly payments will result in year-to-date payments being equal to year-to-date reported expenditures, by program. Failure to report monthly expenditures by the due date will result in a delay in issuing reimbursement payments. If you experience technical difficulties reporting in My Service Log, please contact the Program Manager.

Submitting a Periodic Expense Report
1. In My Service Log select AmeriCorps Financial Report
2. From the AmeriCorps Financial Report drop down menu (located on the upper left) choose the program year
3. From the Available action drop down menu (located on the upper right) choose Initialize next report
4. Fill in the CNCS share and the Grantee Share of expenditures for the month or quarter
5. From the available actions drop down menu choose complete
6. If another person in your organization approves the PER have them review the PER and select approve periodic expense report and submit to Serve Idaho from the available action drop down menu.

<u>Be sure to only include incurred expenses and in-kind match that are captured in your accounting system for that reporting period.</u> Also make sure you have calculated Section 3. Administrative Costs correctly:
1. To Determine the CNCS Share:
([Section I] + [Section II] x 0.0526) x (0.80) = Corporation fixed amount
([Section I] + [Section II] x 0.0526) x (0.20) = Commission fixed amount

2. To determine the Grantee share:
[Total amount of Section I] + [Total amount of Section II] x .10 = Corporation fixed amount
The Commission fixed amount for the grantee share will be $0

Serve Idaho will check the administrative cost calculations with each submitted draw down request. If the 5.26% or 10% is exceeded an adjustment in My Service Log and the draw request will be required before the draw down request is processed.

Draw Request
These procedures detail the process for reimbursement of expenditures incurred by programs of Serve Idaho for AmeriCorps grants. Serve Idaho utilizes periodic expense reports to verify the amounts and types of expenditures reported as allowable costs by programs. Information on expense reports must be supported by source documentation and in the organization's general ledger. Serve Idaho staff will review sub-grantee records during monitoring visits or by other means to ensure compliance with all federal and state guidelines. Sub-grantees must maintain clear documentation of all expenditures and match donations to support information reported on financial statements.

Procedure:
1. The Program's Financial Director will complete a Periodic Expense Report (PER) on My Service Log and save it as completed
2. *The Program Director should review the PER and save it as approve periodic expense report and submit to Serve Idaho (only send to Serve Idaho if information on PER is accurate and complete)*
3. *Financial Director should prepare, sign and submit a Request for Draw to Serve Idaho (requested amount must directly correspond to the current expenses shown in the completed PER)*
4. Serve Idaho will process the request, reconcile any discrepancies or questions and forward the request to Department of Labor (IDOL) fiscal staff for payment.
5. Payment will be issued via check or direct deposit. *(Allow 3 weeks from receipt of request by Serve Idaho to IDOL)*

Considerations:
- Programs may only request reimbursement for expenses incurred
- Programs should report match and in-kind donations in the quarter they are received and/or applied to the grant
- Serve Idaho may request additional supporting documentation for any draw down request prior to processing
- Programs must meet the approved match each quarter unless otherwise waived by Serve Idaho

Draw request form – Attachment 11

Federal Financial Reports (FFRs) – *Due Dates see Page 14*
FFRs are cumulative financial status reports used by the Corporation for National and Community Service to monitor sub-grantee spending. Programs must submit Federal Financial Reports (FFRs) to Serve Idaho quarterly.
FFR Form – Attachment 12
FFR Instructions Attachment 13

The FFR and Program Income
The FFR includes data fields to report program income that programs earn in excess of income earned that is used to meet the program share of expenditures.
FFR FAQ's – Attachment 14a
Program Income FAQ's – Attachment 14b

Other Federal Funds Reporting Requirement
The Kennedy Serve America Act added a requirement for AmeriCorps program grantees to report the amounts and sources of federal funds, other than those provided by the Corporation, used to carry out their programs. This includes other federal funds expended by programs and operating sites. You may need to amend your site agreements to specify this required information collection.

This will be an annual reporting requirement for amounts expended over the prior 12 months and will be reported with the October FFR on the Other Federal Funds Spreadsheet.

The other federal funds reporting requirements are effective with FFRs due in October 20XX, for the reporting period ending September 30, 20XX. **Instructions for reporting other federal funds – Attachment 15**

4. Progress Reports –*Due dates see page 14*

The completed APR/PROGRESS REPORT includes information on: progress toward performance measures, member and volunteer hours, program challenges, etc. The October APR/Progress Report is a cumulative report and a separate word document is used for this report. Serve Idaho will send the APR/Progress report template quarterly with a reminder of the due date.

APR/Progress Report template and Instructions – Attachment 17a and 17b
October APR/Progress Report template and instructions – Attachment 18a and 18b

5. Member Reporting – My AmeriCorps Portal

Programs need to know what is required of program/sites in terms of member data collection in order to monitor that they have met their reporting requirements. The specific CNCS rules as to when some of these forms must be completed are shown in the table below:

MEMBER FORM	DEADLINE
Member Commitment Tracker Form	Immediately upon offer of a position
Member Information Profiles	Must be completed before enrollment can be created
Member Enrollment Forms	Within 30 days of enrollment
Change of Term/Status Forms	Within 30 days of change
Member Exit Form	Within 30 days of exit
Member Time Logs	Nor requirements, but see

These forms are created through the members My AmeriCorps Portal and approved by Program staff. It is important that member forms are completed in a timely manner. Timely completion could also play a role in future grant funding decisions, especially for competitively awarded funds.

Time logs track hours served by members in direct service, fundraising and training. (Note: the average of member training hours can be no more than 20% per grantee. Member fundraising hours may be no more than 10% per person.) Time logs need to be completed on a regular basis in order to ensure that the program/site is tracking member hours accurately.

My AmeriCorps and My Service Log have tools to help programs monitor member progress. These tools can identify members who are falling behind and at risk of not being able to complete their required number of hours of service to earn an education award before the end of the program year.

6. Sustainability

General Overview
Serve Idaho defines "sustainability" as a plan that, through an organization's use of various resources, will provide for a stronger infrastructure, stronger programs, and community self-sufficiency in regards to supporting the needs of its constituents, its financial health, and its ability to be well managed and accountable.

Sustainability Policy
Programs must also follow the Sustainability Policy. Each program is required to gradually decrease reliance on federal funds, while continuing to meet the minimum match requirements.
More information on these topics may be found in the AmeriCorps Provisions.

Policy Guidelines
The Corporation for National and Community Service has published the following increasing match requirements for all AmeriCorps programs:

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Minimum overall share	24%	24%	24%	26%	30%	34%	38%	42%	46%	50%

Under this policy, each program is required to gradually decrease its reliance on federal funds, yet still meet the Overall Minimum Match requirements. By either cash or in-kind matches in any category, programs must reach the required match level each year.

Please note that the Corporation has created an alternative match requirement for grantees located in either a rural or a severely economically distressed area prior to submitting their grant application. For additional information on the alternative match contact Serve Idaho's Program Manager.

Intent of the sustainability policy
The intent of the policy on sustainability is to decrease program dependency on federal funds, to ensure that services provided by AmeriCorps members will continue if federal funding is discontinue, and to make more funding available to support new programs. Each program should put together a written sustainability plan and track the progress made each year.

The Commission will provide assistance to programs in the area of sustainability by sponsoring additional training and technical assistance on collaborations and partnerships, leadership, and fundraising, as needed.

7. Record Retention
All financial records, supporting documentation, statistical records, evaluation and performance data, member information, and personnel records must be retained for three years after the close of an AmeriCorps grant.

If any litigation, claim, negotiation, audit or other action involving the records has been started before the expiration of the 3-year period, the records must be retained until completion of the action and resolution of all issues which arise from it, or until the end of the regular 3-year period, whichever is later.

Program Monitoring and Evaluation

1. Purpose of Monitoring

State Service Commissions and National Programs face many challenges in administering AmeriCorps programs. Limited staff capacity, as well as unusual program models, can make monitoring and management particularly difficult. As stewards of public funding, Serve Idaho needs to ensure that the programs and sites they fund are aware of their contractual requirements and are in compliance with all of the rules, regulations, and provisions governing AmeriCorps funds. To accomplish this, Serve Idaho's Program Manager must create adequate systems for monitoring program/sites that are fully implemented and available in writing.

Components of a Monitoring Strategy
An adequate monitoring strategy features an array of oversight of program/sites, including:
- Document Review
- Compliance Reviews
- Program Quality and Performance Reviews
- Special Audits or Surveys
- One-on-one technical assistance to resolve any issues

In addition, all programs with one or more high-risk factors, determined by the Risk Assessment Tool, will receive additional visits from Serve Idaho.

This policy will help to ensure high quality AmeriCorps programs are implemented while maximizing staff time and meeting the recommendations of the Inspector General in regards to program monitoring.

2. Program Risk Assessment

Program risk assessment are used to allow Serve Idaho to effectively monitor compliance and progress of AmeriCorps*State programs in Idaho and to provide an adequate level of both on-site and off-site technical assistance based on the systematically assessed capacity of programs to administer the AmeriCorps Program.

Procedure
Each Idaho AmeriCorps program will be analyzed and assigned a risk category at or near the end of a grant period. The monitoring strategy specifically addresses issues contributing to the assigned risk category for each program, which may include issues other than those specifically listed in the **Risk Assessment Worksheet – Attachment 19**. The overall monitoring strategy will allow for the most time-intensive monitoring of the highest risk projects, with less time-intensive monitoring strategies applied, as appropriate, to lower risk projects.

Risk Assessment
On at least an annual basis (late summer/early fall or as new programs are funded) Serve Idaho staff will assess the risk associated with program using the **Program Risk Assessment Worksheet – Attachment 19**. Based on this risk assessment, Serve Idaho staff will draft a monitoring/site visit plan for each grantee as appropriate to the identified risk factors and risk categories outlined below. This worksheet will also be provided to the Program Committee during the grant application review process. **Those programs in their first year, which have not completed half a year or more, will automatically be scored as medium risk, unless other factors move them into a high risk category. If they are considered high risk, Serve Idaho staff will provide written documentation to the Program Committee stating what factors put them in this category.**

3. Monitoring/Site Visits

General

In general, the Program Manager (and Commission members or other staff, as appropriate) will meet with members, site supervisors or other stakeholders to discuss the program. When possible, members will be observed in service. Serve Idaho acknowledges that issues such as confidentiality may prevent this. Serve Idaho will try to obtain as much information as possible about program activities and services in order to identify best practices or areas for improvement.
Member Visit Survey – Attachment 20
Host Site Supervisor Survey – Attachment 21

A programmatic and fiscal site visit may be made to every grantee or site one time per grant cycle, one time per year, or more often as may be appropriate. The purpose of the visit is to assess the program's compliance with federal regulations and to help the program improve systems to pass a formula OIG audit. Member files, program policies and fiscal records will be reviewed during the visit. The AmeriCorps Program Review Instruments will be used to assess program compliance

Serve Idaho will send out tentative dates for the site visit at the beginning of the grant year. A week before the site visits Serve Idaho will send out the agenda and any other documentation needed for the site visit. The results of the visit will be reviewed with program staff at the end of the visit. A site visit feedback letter will be sent to the program within a two week period and should include only those issues discussed during the visit.

Typical site visit activities include the following:

ACTIVITY	INDIVIDUALS INVOLVED
Fiscal Interview and Review	Program Fiscal Staff and Program Director
Program Interview	Program Director
Member File and Timesheet Review	Program Director and/or Staff
Field Interviews	AmeriCorps Members

Site visits can have many purposes, some of the most important of which are summarized in the table below:

Learning	Finding out about AmeriCorps program service activities and community partners
Publicity	Hearing success stories
Compliance	Assuring that all federal, state, local , contractual, and organization-specific regulations, policies, and provisions are being followed
Monitoring Progress	Comparing actual outputs and outcomes to the performance measures outlined in a programs contract
Technical Assistance	To improve overall quality of the program

The AmeriCorps program review instruments to be completed are as follows:

Pre Visit Checklist
This checklist will be completed before the site visit. Any important issues or concerns identified during the review will be will be discussed with the program.

Financial Compliance
A **Financial Site Visit Questionnaire – Attachment 22a or 22b** will be filled out by Serve Idaho's Program Manager. The majority of this part of the site visit will be completed with the assistance of the program's fiscal staff, but some questions will most likely be answered by program staff. Other testing grid worksheets used during the financial compliance part of the audit are as follows:

- **Separation of Duties Worksheet – Attachment 23**
- **Financial Transaction Worksheet – Attachment 24**
- **Matching Cash and In-kind Worksheet – Attachment 25**

Programs should have copies of their Period Expense Reports (PER's) and Federal Financial Reports (FFR's) available when the site visit review takes place. A copy of the program's original budget should also be available. In general, a program must have all required backup documentations for each CNCS and Grantee share expenditures reported on their PER's and FFR's. The financial site visit will look at the following documentation:

- Match
- Receipts for Grant Expenditures
- Internal Controls Systems
- Accounting Systems
- Payroll System
- A-133 Audit (if applicable)

Programmatic Compliance
A **Programmatic Site Visit Questionnaire – Attachment 26** will be filled out by Serve Idaho's Program Manager. The Program Director and staff (if appropriate) will need to be available. Other testing grid worksheets used are as follows:

- **Member Performance Evaluation Worksheet – Attachment 27**
- **Member Timesheet Worksheet – Attachment 28**
- **Program Staff Timesheet and Background Check Worksheet – Attachment 29**
- **Member File Worksheet – Attachment 30**

Written documentation and/or proof of compliance are necessary in case of an audit and need to be provided during the site visit. Programs should have written policies and procedures and the documentation needs to be readily accessible.

Review Outcome
After the monitoring visit is complete, the Program Manager will provide written feedback relating to the review. The monitoring review will be used to determine if additional site visits are necessary and may impact a program's renewal application and ability to access additional training funds.

High-Risk Programs
If a program is considered high-risk they will have more than one site visit. The agenda will be determined by the reason for the visit. For example, the agenda for a visit that is being held because of a change in program director will focus on expectations of programs, AmeriCorps regulations and relationship building. The agenda for a visit that is being conducted because of concerns regarding prohibited activities will focus on meeting with members, site supervisors, and program staff to assess whether prohibited activities were taking place and to ensure that prohibited activities do not occur in the future. A site visit feedback letter will serve as written documentation of what occurred during the visit.

High-risk factors may include, but are not limited to:
- A change in program director or other key staff

- Legitimate member complaints to Serve Idaho
- Poor past performance by the program (based on progress reports and/or previous site visits)
- Concerns regarding prohibited activities
- Compliance with reporting deadlines
- Financial compliance issues

Monitoring Checklist

In general, it is expected that program staff will monitor grantees and sites to examine the following:

Member Documentation
- AmeriCorps Application
- Determination of Eligibility
- Background Checks
- Enrollment Forms
- Retention Statistics (end of term/exit, change of status/term, terms of release)
- Hours Worked and Timesheets
- Training Received
- Benefits (child care, health care, etc.)
- Member Service Agreements
- Position Descriptions
- Performance Evaluations (at least mid-year and end of year)

Program Documentation
- Grievance Procedures
- Prohibited Activities
- Staff Timesheets
- Progress Toward Meeting Performance Measure Targets
- Measurement Tools
- Use of My Service Log
- National Identity (signage, uniforms, published materials)
- Mechanism for Community Input and Collaboration
- Subcontracts or Host Site Agreements (if applicable)

Desk-Based Monitoring

While an on-site monitoring visit can provide a valuable, direct view of program operations, it is a resource-intense form of monitoring. Desk-based monitoring is more sparing of scarce resources of staff time and money and, properly used, can actually forestall the need for more intensive intervention later on to resolve grantee problems.

Serve Idaho will utilize My Service Log and My AmeriCorps as an effective management and monitoring tool. For instance, through My Service Log and My AmeriCorps, it is possible to:
- Review member timesheets
- Review each program/site's progress on member recruitment and retention
- Track member progress toward completing service hours
- Check timeliness of reporting, including member forms, progress reports, and financial reports.
- Conduct member enrollment queries

4. Grant Closeout

Programs shall submit, within 60 calendar days after the date of completion of the award, all financial, performance, and other reports as required by the terms and conditions of the award. The Federal awarding agency may approve extensions when requested by the recipient.

Unless the Federal awarding agency authorizes an extension, a recipient shall liquidate all obligations incurred under the award not later than 60 calendar days after the funding period or the date of completion as specified in the terms and conditions of the award or in agency implementing instructions.

The federal awarding agency shall make prompt payments to a program for allowable reimbursable costs under the award being closed out.

The program shall promptly refund any balances of unobligated cash that Serve Idaho has advanced or paid and that is not authorized to be retained by the recipient for use in other projects. OMB governs unreturned amounts that become delinquent debts.

When authorized by the terms and conditions of the award, Serve Idaho shall make a settlement for any upward or downward adjustments to the Federal share of costs after closeout reports are received.

The program shall account for any real and personal property acquired with Federal funds or received from the Federal Government in accordance with Sections § 2543.31 through § 2543.37.

In the event a final audit has not been performed prior to the closeout of an award, Serve Idaho shall retain the right to recover an appropriate amount after fully considering the recommendations on disallowed costs resulting from the final audit.

Serve Idaho Closeout Requirements
Serve Idaho will send a closeout letter to our Formula and Competitive programs at the end of our three year grant cycle. If the program does not re-apply for AmeriCorps funding they will receive a closeout letter. After the program receives the letter the closeout letter they will need to provide the following:
1. Final Progress Report
2. Final FFR that is cumulative over the entire project period.
3. **Inventory of Equipment** ($5,000 or over, unused supplies with an aggregate value greater than $5,000 purchased with grant funds) – **Attachment 31**
4. **Inventory of residual supplies – Attachment 32**

If the program will not be able to meet the overall match they must request a waiver prior to the closeout of the grant.

5. PROGRAM EVALUATION

As articulated in the AmeriCorps regulations [45 CFR §§ 2522.700-740](#), all AmeriCorps State and National grantees that receive an average annual Corporation grant of $500,000 or more must conduct an independent evaluation. An independent evaluation uses an external evaluator who has no formal or personal relationship with, or stake in the administration, management, or finances of the grantee or of the program to be evaluated.

All other AmeriCorps State and National grantees must conduct an internal evaluation. An internal evaluation is designed and conducted by qualified program staff or other stakeholders, such as board members, partners, or volunteer affiliates.

If you are….	You will submit an….
State formula program	Internal Evaluation
State competitive program with an average annual corporation grant of $500,000 or more	Independent Evaluation
State competitive program with an average annual cooperation grant under $500,000	Internal Evaluation

If you are recompeting for the first time (4th year) you are required to submit "a summary of your evaluation efforts or plan to date, and a copy of any evaluation that has been completed, as part of your application for funding" (45 CFR § 2522.730). If you are recompeting again, you are required to submit a completed evaluation with your application. The Corporation will consider the results of your evaluation "in assessing the quality and outcomes of your program" (45 CFR § 2522.470).

If you receive an average of $500,000 or more per year from the Corporation, averaged over the last three years of funding you have received before you recompete, we expect you to conduct an independent evaluation by contracting with an external evaluator. The AmeriCorps regulations describe how this evaluation should provide evidence of a causal relationship between program activities and outcomes (45 CFR § 2522.700). You may consider using an experimental or quasi-experimental design, or compare your results with national/state/local data. Your external evaluation method should match the size, scale, and purpose of your program.

In an ongoing effort to reduce burden on programs, especially those with smaller grants, programs with an average annual grant under $500,000 may submit an internal evaluation. The primary difference between the independent evaluations that programs who receive $500,000 or over are required to submit and the internal evaluation is who conducts the evaluation study. Your own staff and other stakeholders can serve as internal evaluators.

We encourage you to design your internal evaluation so that it will yield data most useful to you. You may opt for an impact evaluation, or you may conduct a process or management evaluation. You are not required to conduct an experimental or quasi-experimental evaluation that proves causality, which is required of programs that receive $500,000 or over, although you are allowed to conduct this type of study. We expect the same high quality that we expect of a larger programs, regardless of the type of evaluation you decide to conduct.

Additional Resources

Corporation for National and Community Service Website:
http://www.nationalservice.gov/

CNCS National Service Knowledge Network:
http://www.nationalserviceresources.org/

AmeriCorps Website:
www.americorps.gov

Serve Idaho Website:
http://serveidaho.gov/

CNCS Search Statutes, Regulations, Provisions and FAQs
http://www.nationalservice.gov/sites/default/files/documents/1990_serviceact_as%20amended%20through%20pl%20111-13.pdf

CNCS Criminal History Checks Information:
http://www.nationalservice.gov/for_organizations/manage/history_checks.asp

National Service Marketing and Media Resources:
http://www.nationalservice.gov/newsroom/marketing

Member Service Gear
http://www.nationalservicegear.com/
http://www.companycasuals.com/careeruniforms/start.jsp **-** contact Jake Hunter 1603 S. Latah Street Boise, ID. 83705 Ph.208.342.8346 Toll Free 800.698.8346 Fax 208.342.9124

National Sex Offender Public Website:
http://nsopw.gov/Core/Conditions.aspx

AmeriCorps Child Care Information
http://www.americorpschildcare.com/

AmeriCorps Education Award Information
http://www.nationalservice.gov/programs/americorps/segal-americorps-education-award

AmeriCorps Logos
http://www.nationalservice.gov/about/media_kit/logos.asp

National Service Days Calendar
http://www.serveidaho.gov/Events/NationalDaysofService.aspx

AmeriCorps Forms
http://www.nationalservice.gov/programs/americorps/current-members/forms

CNCS Funding Opportunities
http://www.americorps.gov/for_organizations/funding/index.asp

Capacity Building Toolkits for Faith-Based and Community Organizations
http://www.acf.hhs.gov/programs/ocs/ccf/resources/toolkit.html

Learning Pathways for Program Startup
https://www.nationalserviceresources.gov/learning-pathways-program-start

Manage current grants
http://www.nationalservice.gov/for_organizations/manage/index.asp

National Service Knowledge Network
http://www.nationalserviceresources.org/

AmeriCorps Connect – Resource for AmeriCorps State and National Grantees, Members, and other interested in AmeriCorps
http://www.americorpsconnect.org/

EnCorps: Resources for Member Development
https://www.nationalserviceresources.gov/links/encorps-tried-and-true-resources-member-development